

NBS End User Training: Clinical Center Patient Entry

Student Guide

Table of Contents

New Patient Request Entry: Course Overview	1-1
New Patient Request Entry: Course Overview	1-2
Course Objectives	1-3
Agenda	1-4
Training Guidelines	1-5
Questions	1-6
How to Use the Manual	2-1
How to Use the Manual	2-2
NBRSS Overview	3-1
NIH Business and Research Support System (NBRSS) Overview	3-2
NIH Enterprise IT Systems Architecture	3-3
NBRSS Project Objectives	3-5
NBRSS Governance Structure	3-6
NBS – How it Works	3-8
Expected Benefits of the NBS	3-9
Realities of the NBS	3-10
Track 1 Activities: General Ledger/Budget	3-11
Sample Track 2 Activities: Travel	3-12
Oracle Basics	4-1
Oracle Basics	4-2
Lesson Objectives	4-3
Accessing the NIH Portal	4-4
Accessing Oracle via the NIH Portal	4-5
Logging in to the NIH Portal	4-6
Adding a Community to your NIH Portal View	4-7
Form Terminology	4-8
Field Colors	4-12
List of Values	4-13
List of Values Auto Selection	4-14
Long-List Fields	4-16
Using Calendars	4-17
Application Toolbar	4-18
File, Edit, and View Menus	4-20
Searching for Existing Records	4-22
Using the Find Window	4-23
Query Results	4-24
Searching for Data Using Query Mode	4-25
Exiting Oracle	4-26
Logging Out of Oracle	4-27
Lesson Summary	4-29
Entering Bethesda Clinical Center Patient Travelers	5-1
Entering Bethesda Clinical Center Patient Travelers	5-2
Lesson Objectives	5-3
Entering New Patient Travelers	5-4
Clinical Center Patient Entry Process	5-5
Option 3: Oracle Extension	5-6
Search NBS for Existing Records	5-7
Searching for Existing Records	5-8
Searching for Existing Records by Name	5-9
Searching for Existing Records by Social Security Number	5-11
Searching for Employees	5-12

Entering A New Patient Traveler	5-16
Entering Clinical Center Patients.....	5-17
Practice Lab	5-24
Updating Patient Records	5-25
Updating Clinical Center Records	5-26
OFM Identifies Error on the Patient Audit Report	5-27
Clinical Center Identifies Error	5-28
Patient Information Changes	5-29
Modifying Clinical Center Patient Information.....	5-30
Practice Lab	5-36
Patient Audit Report.....	5-37
Submitting the Patient Audit Report.....	5-39
Practice Lab	5-42
Manually Executing Scheduled Processes.....	5-43
Option 3: Oracle Extension	5-44
Running the Patient Addition Request Set	5-45
Submitting the Patient Addition Request Set.....	5-46
Practice Lab	5-51
Lesson Summary	5-52
Important Dates and Information.....	6-1
Important Dates and Information.....	6-2
NBS Track 2 Go-Live.....	6-3
Initial Oracle Set Up Required	6-4
NBS Travel Support Resources	6-5
Evaluation.....	6-6
Good Luck	6-7

New Patient Request Entry: Course Overview

Chapter 1

New Patient Request Entry: Course Overview



New Patient Request Entry: Course Overview

Track 2 End User Training
August 2003

Course Objectives



Course Objectives

- Overview of the NBRSS and NBS
- Oracle Basics
- New Patient Request Processes
- Important Dates and Activities

Agenda



Agenda

1. Discuss NBRSS and NBS Project
2. Short Introduction to Oracle
3. Discuss New Patient Entry Process
4. Hands-on Exercises
5. Wrap Up


Training Guidelines



Training Guidelines

1. Ask Questions
2. Cheating is encouraged
3. Don't let me get ahead
4. Have fun!

Questions



Questions

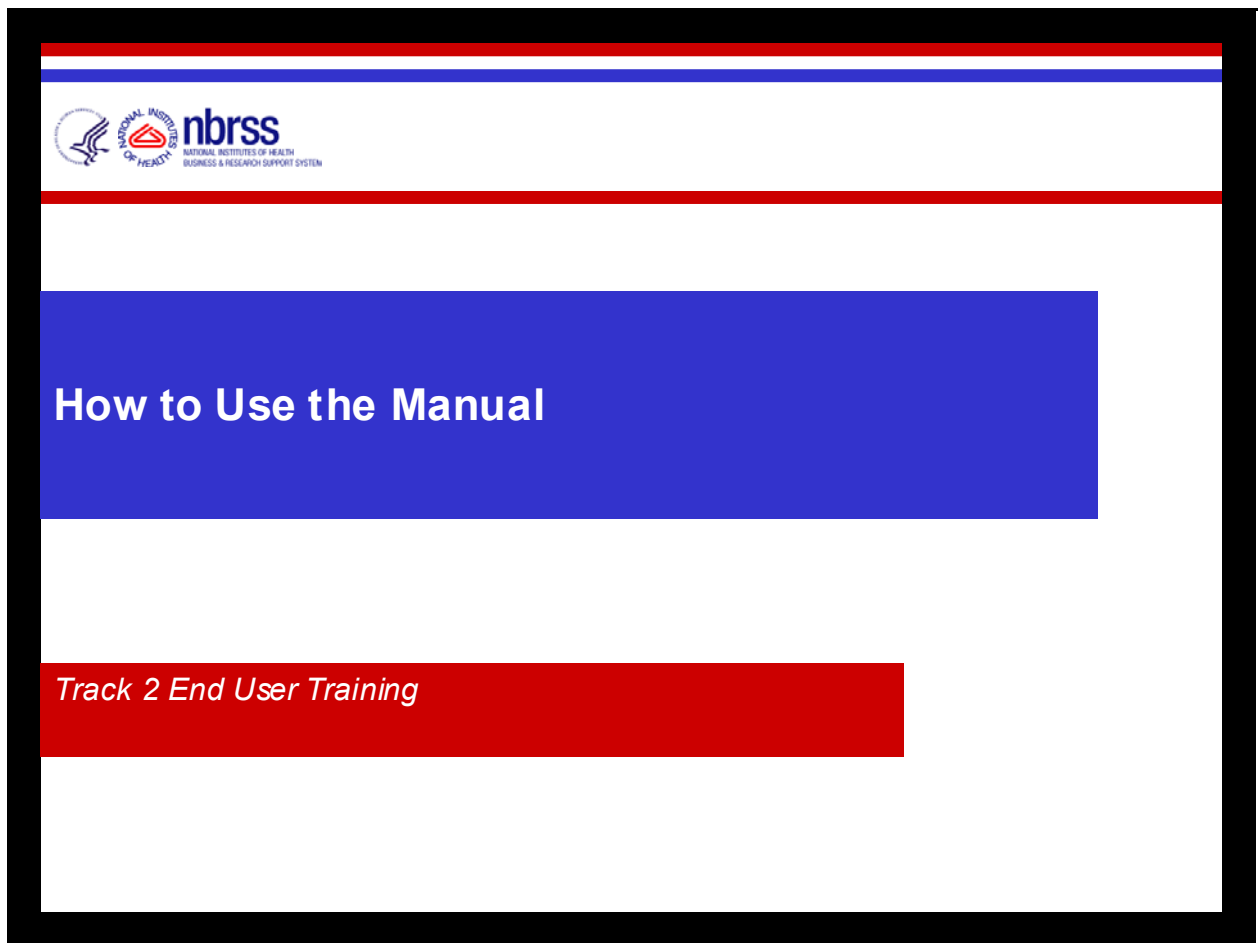
Questions?

Page 4

How to Use the Manual

Chapter 2

How to Use the Manual



How to Use the Manual




How to Use the Manual

- Each Student Guide contains a Table of Contents

Table of Contents

NIH Receivables Customer Entry: Course Overview	1-1
NIH Receivables Customer Entry: Course Overview	1-2
Course Objectives	1-3
Agenda	1-4
Training Guidelines	1-5
How to Use the Manual	1-6
Accessing Oracle via the NIH Portal	1-16
Logging in to the NIH Portal	1-17
Adding a Community to your NIH Portal View	1-18
Questions	1-19
NBRSS Overview	2-1
NIH Business and Research Support System (NBRSS) Overview	2-2
NIH Enterprise IT Systems Architecture	2-3
NBRSS Project Objectives	2-5
NBRSS Governance Structure	2-6
NBS – How it Works	2-8
Expected Outcomes of the NBS	2-9
Realities of the NBS	2-10
Track 1 Activities: General Ledger/Budget	2-12
Sample Track 2 Activities: Travel	2-13
Accounts Receivable Overview	3-1
Track 2 Accounts Receivable Overview	3-2
Lesson Objectives	3-3


How to Use the Manual



How to Use the Manual

- Each Chapter constitutes a lesson
- Each lesson has a set of objectives

Lesson Objectives



Lesson Objectives

After this lesson you should know how to:

- Process customer addition requests
- Process customer update requests
- Conduct routine customer table maintenance activities

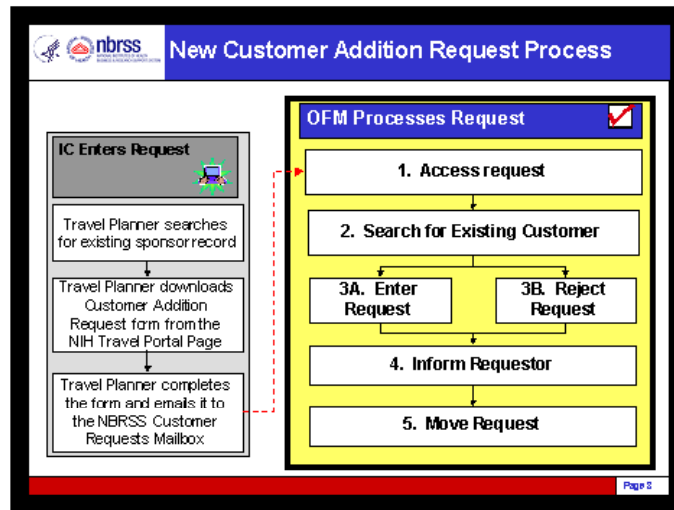
Page 1

Page 2

How to Use the Manual


- The lessons contain information on the business processes as well as step-by-step instructions on how to perform tasks in the NBS

New Customer Addition Request Process



All requests should be submitted via email. Requests will be forwarded to a central mailbox, accessed through Microsoft Outlook.

How to Use the Manual

**nbrss**
NATIONAL INSTITUTE OF HEALTH
BUSINESS & RESEARCH SUPPORT SYSTEM

How to Use the Manual

Step-by-step instructions on how to perform tasks in the NBS are contained in “Navigation” documents.

1

Navigations:

1. May contain a **Purpose** or **Prior Activity** section
2. Contain a Navigation Box on the first page
3. Contain a picture of the screen that you will use to enter the data

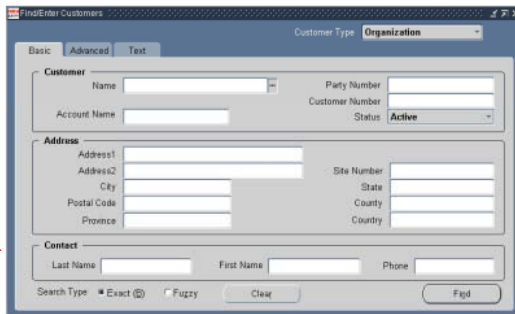
Entering a New Customer

Purpose



The purpose of this document is to describe how new customers are entered into NBS. If a customer already exists in NBS, but requires modification, then refer to one of the following documents:

- Entering a New Customer Contact
- Entering a New Customer Bill-To Address
- Modifying Customers

NIH Receivables Customer Entry
N > Customers > Standard
Find/Enter Customers



How to Use the Manual

**nhrss**
NATIONAL INSTITUTES OF HEALTH
BUSINESS & RESEARCH SUPPORT SYSTEM

How to Use the Manual


- Navigation Boxes describe how to get to the appropriate screen in Oracle to perform the task

NIH Receivables Customer Entry	←	Oracle Responsibility
N > Customers > Standard	←	Navigation Path
Find/Enter Customers	←	Screen Name

- Navigation Boxes are always followed by a screen shot of the window you will navigate to.

Page 5


How to Use the Manual



How to Use the Manual

1. Directive statements will help you determine your next step. The statements are indicated in **Bold**

2. Words in **Bold** font indicate a field, window, or button name



If a message is received stating that no customer matched your criteria, goto task #3. Otherwise, goto task #4.

3. Select the **Cancel** button.

Goto task #1.

4. Place your cursor in the line associated with the customer contact that displays both the **Party Number** and **Customer Number**.

5. Select the **OK** button.

Result: The **Customers - Standard** window is displayed.

Page 6

How to Use the Manual



How to Use the Manual

The shaded fields indicate that the entry is optional or that you should accept the default values


7. Enter the city name in the **Site Name** field.
8. Enter the following address information.

Field	Description
Country	Select the appropriate country from the LOV.
Address	Enter the address line information
City	Enter the city name
State	Enter the state
Postal Code	Enter the Postal Code
Province	Enter the province abbreviation
County	Enter the county name

Example: The following is a sample completed **Supplier Sites** window.


If a field is not referenced, you should not change the default value.

How to Use the Manual

**nbrss**
NATIONAL INSTITUTES OF HEALTH
BUSINESS & RESEARCH SUPPORT SYSTEM

How to Use the Manual

Notes provided after the task instruction provide useful information or helpful hints to complete the step.

13. In the **Payment Method** field, select the appropriate payment method for this supplier.
 **Note:** Once bank information is associated with a supplier, the **Payment Method** field is automatically updated to **Electronic**.
14. Save the record.

Page 8

How to Use the Manual

How to Use the Manual

The end of the task will be indicated by **End of Activity.**

Example: Below is a sample completed **Contacts: Roles** region tab.

Contact Name							
Last	First	Title	Number	Job	Mail Stop	Reference	Active
FELDMAN	BENJAMIN	Mr.		Treasurer			<input checked="" type="checkbox"/>
							<input type="checkbox"/>
							<input type="checkbox"/>

Contact Roles		
Description	Primary	
Bill To	<input checked="" type="checkbox"/>	
	<input type="checkbox"/>	
	<input type="checkbox"/>	

15. Save your work.

End of activity.


Page 9

Copyright © Oracle Corporation, 2001. All rights reserved.

How to Use the Manual

Chapter 2 - Page 11


How to Use the Manual



How to Use the Manual

Each lesson concludes with a Lesson Summary

Lesson Summary



Lesson Summary

In this lesson you learned how to:

- Process customer addition requests
- Process customer update requests
- Conduct routine customer table maintenance activities

Page 26

Page 10

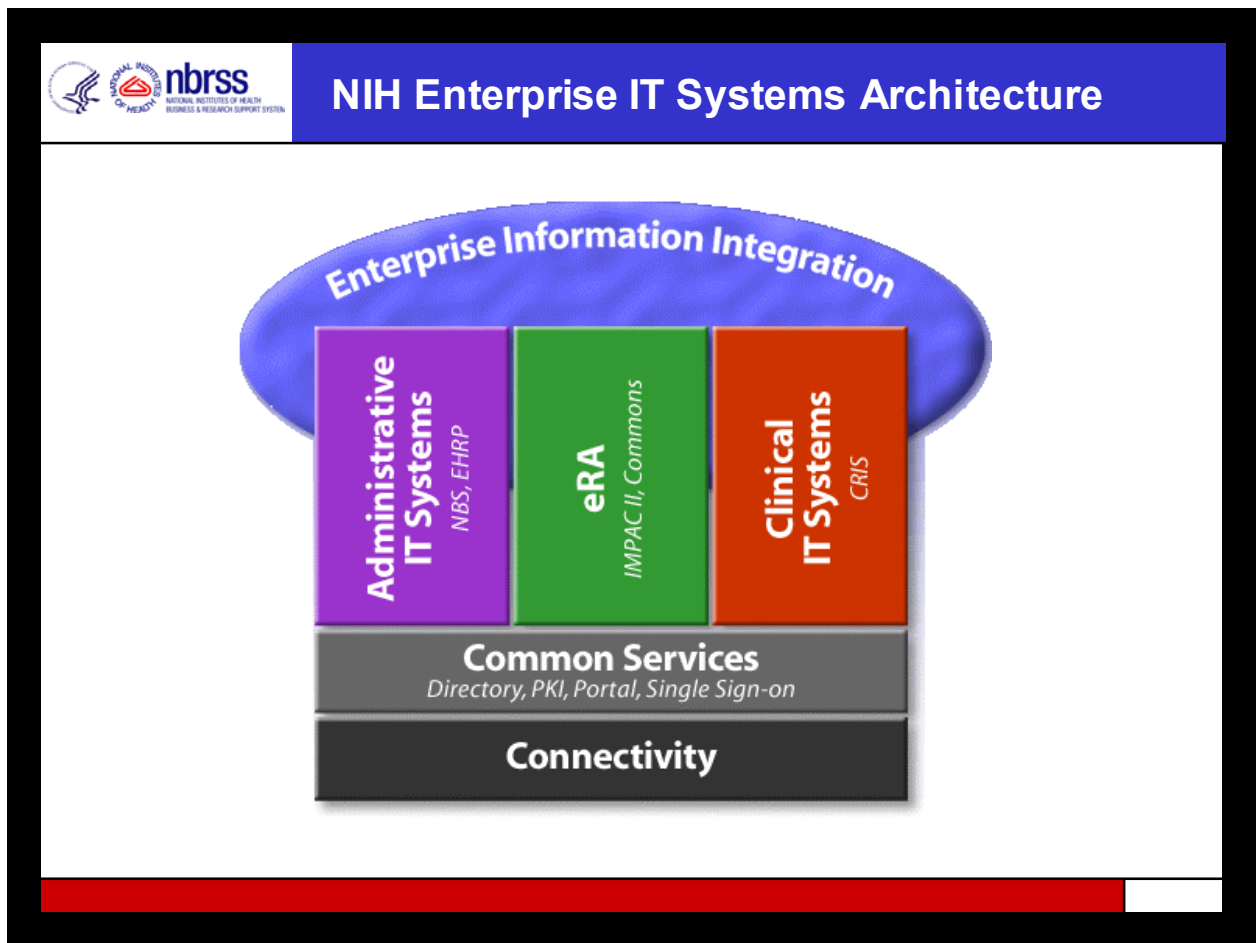
NBRSS Overview

Chapter 3

NIH Business and Research Support System (NBRSS) Overview



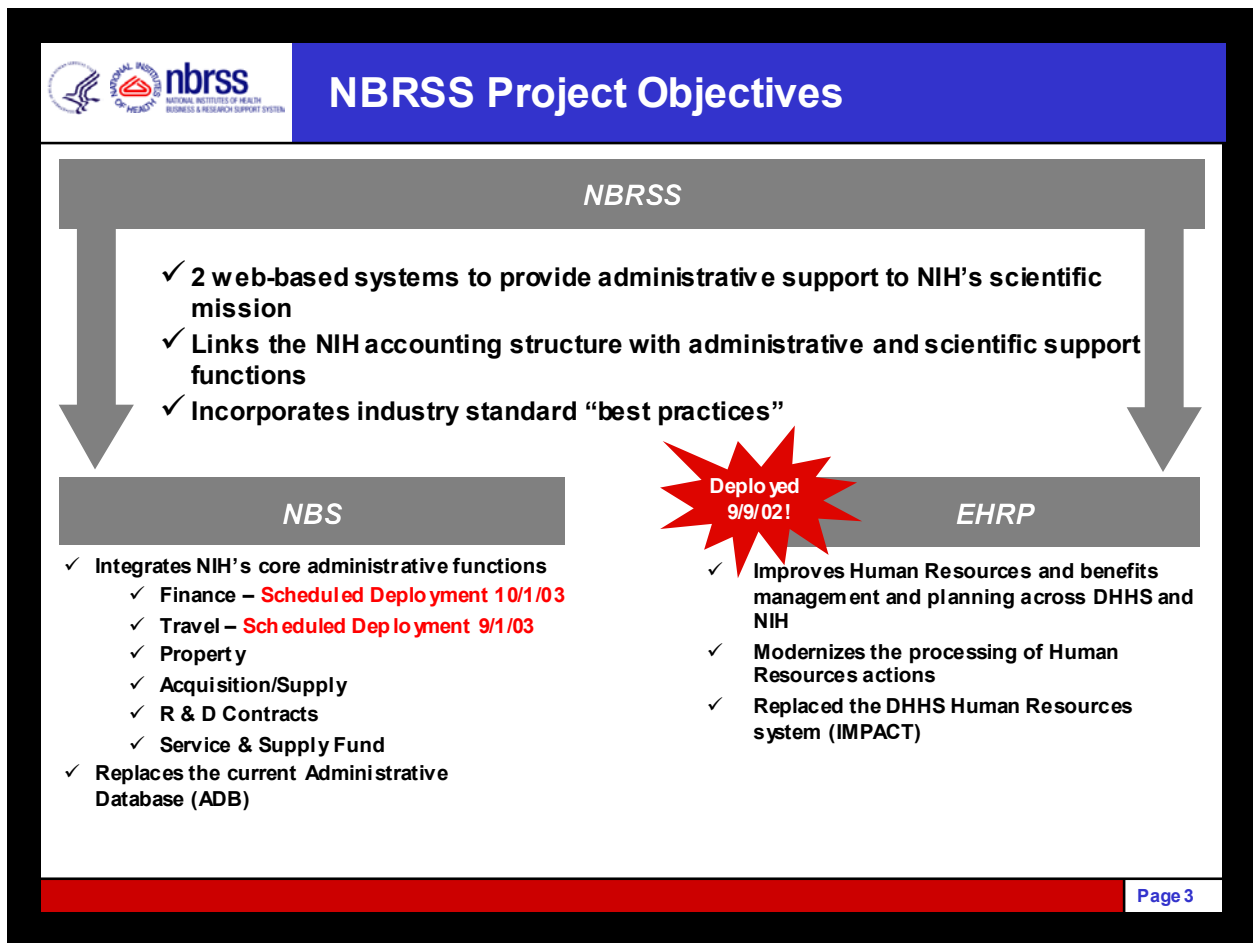
NIH Enterprise IT Systems Architecture



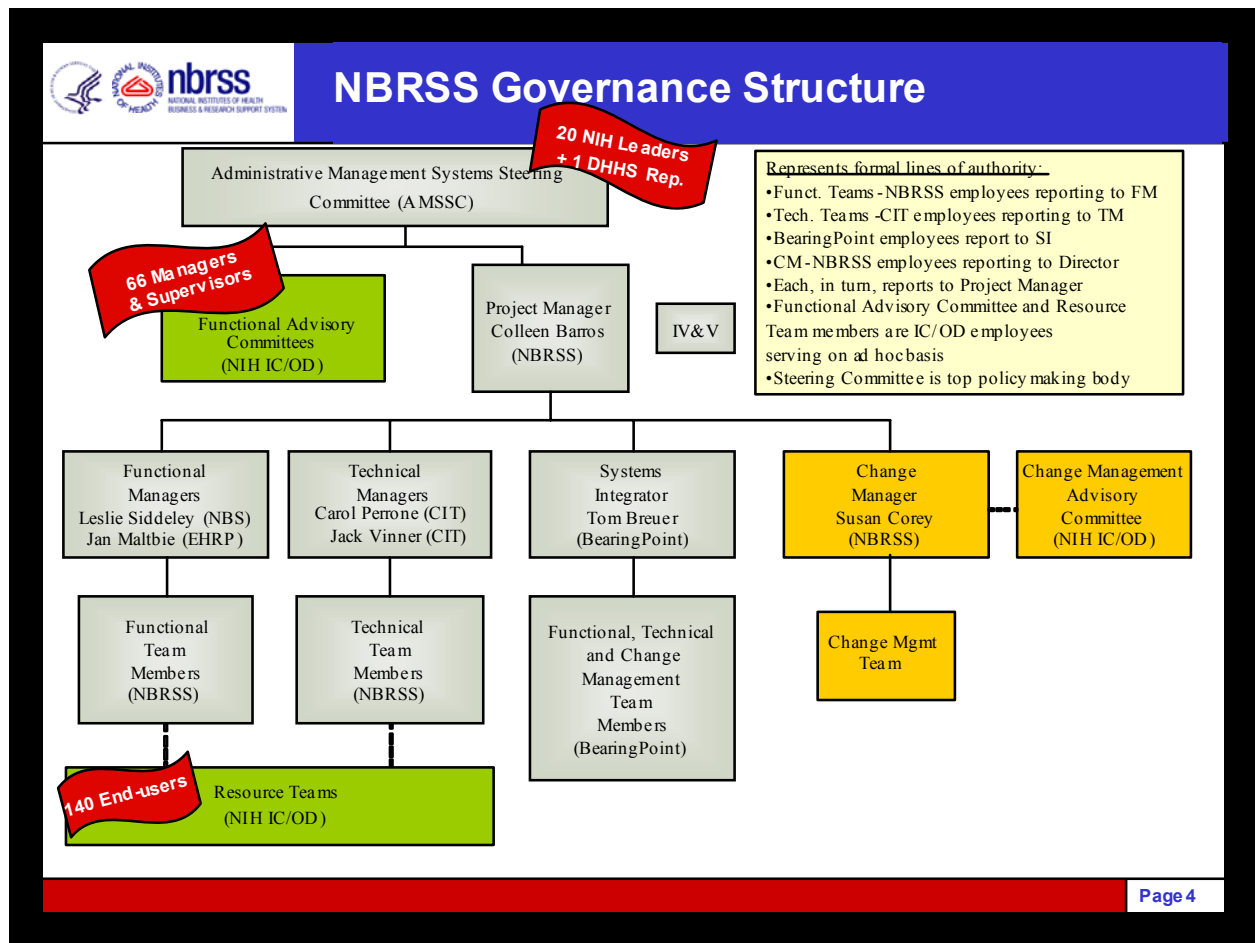
NIH Business System (NBS) – How it all started

- Project began in FY 1999 with the development of a comprehensive business case to replace NIH's Administrative Data Base (ADB).
- ADB -- An integrated data base that services most of NIH's administrative and support functions.
 - Central Accounting, Accounts Payable, Travel, Property, Acquisitions/Supply, Contracts, and Service and Supply Fund activities.
 - Transactions feed the accounting system from the point of origin, i.e., procurement requisition, travel order, etc.
 - Used by about 5,000 NIH employees, most of whom are in the Intramural Research Program.
 - Processes approximately 150,000 transactions each day.
- Work groups comprised of 200 NIH employees helped with the NIH decision to go with a commercial Enterprise Resource Planning (ERP) product.
- The challenge is not to design software but to adapt NIH business practices to the "best practices" embedded into the commercial ERP product.

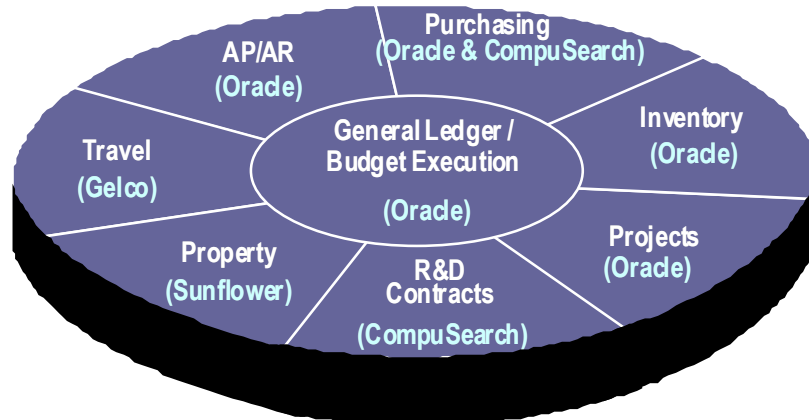
NBRSS Project Objectives



NBRSS Governance Structure



NBS - An Integrated System

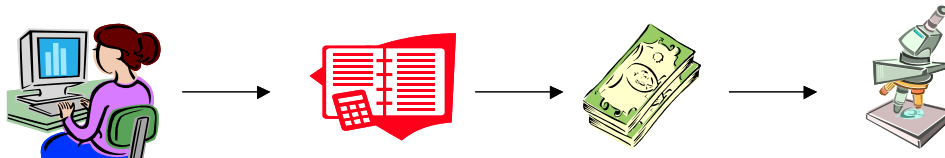


NBS – How it Works



NBS – How it Works

- Typically, transactions proceed horizontally across several administrative functions.
 - Administration uses the NBS to purchase a piece of equipment for a scientist.
 - In *real time*, this information automatically transmits to finance to check funds availability; obligate funds; and once the equipment is received, pay the bill.
 - Upon receipt this information automatically flows to property to track the equipment.



- Why an integrated system?
 - Eliminates multiple entries;
 - Minimizes the potential of errors;
 - Provides accurate reports; and
 - Eliminates the expense and technical difficulty of linking together systems that are dedicated to individual functions.

Expected Benefits of the NBS



Expected Benefits of the NBS

- One integrated system, linking each of the major business functions, including human resources;
- Better integration and sharing of information within the organization;
- Improved managerial control and access to key data; and
- Improved financial statements and management reports across NIH, using the new Accounting Classification Structure (ACS).

Realities of the NBS



Realities of the NBS

- NBS replaces a dying system – something had to be done. NBS offers a modern-day feel, but no system is perfect, and the NBS will not solve everything.
- NBS is not a proprietary system – we're bound by the software, and customizations are costly.
- There will be a phased conversion period, so we will not experience the full functionality and benefits all at once. As pieces of the current system are shut down and the new system is set up, there will be disruption.
- The administrative, legal, and regulatory policies outside of the NBS remain.
- To reap the full benefits of the NBS, local IC policies and approval levels may need to be reevaluated.
- The NBS project is not operating independently – it is influenced by various Department initiatives.

Track 1 Activities: General Ledger/Budget



Track 1 Activities: General Ledger/Budget

- NBS General Ledger replaces the CAS as the system of record
- New projects (former CANs) are created
- Budgets are entered based on the new accounting structure

Sample Track 2 Activities: Travel



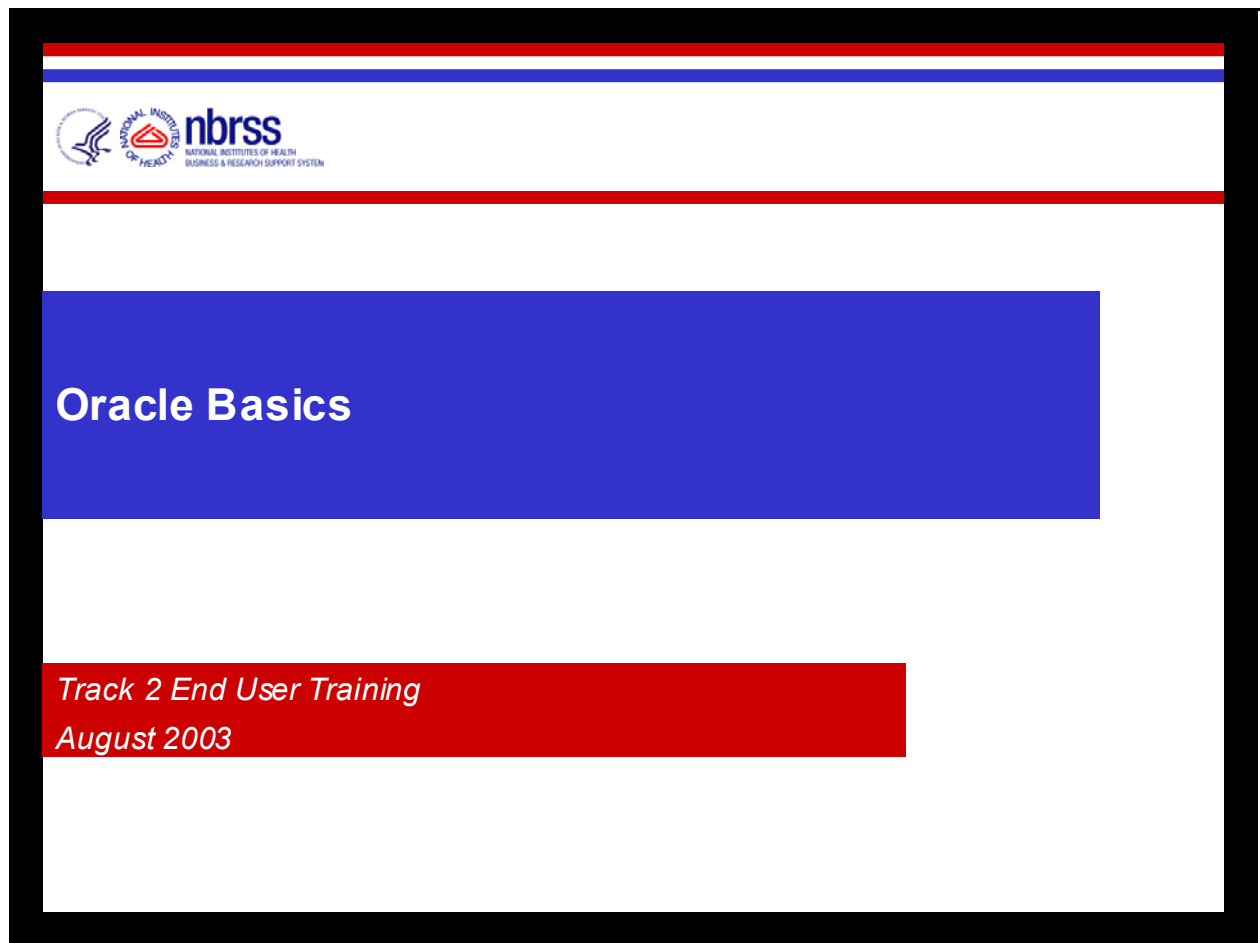
Sample Track 2 Activities: Travel

- **NBS Travel System**
 - Enter, approve, and electronically route travel documents, such as authorizations and vouchers.
- **Accounts Payable**
 - Process payments to travelers and travel management centers for expenses entered in the NBS Travel System
 - Maintain the database of travelers and banking information
- **Accounts Receivable**
 - Establish a list of sponsors that is referenced by the NBS Travel System
 - Track amounts due from and paid by non-federal organizations that sponsor travel
- **Cash Management**
 - Reconcile invoices from TMC files to expenses entered in the NBS Travel System and processed in Accounts Payable
- **General Ledger/Fed Admin**
 - Collect data from all financial subledgers
 - Record in-kind contributes from sponsors
 - Enter manual journal vouchers

Oracle Basics

Chapter 4

Oracle Basics



The slide features a header with the Nabrss logo (National Institutes of Health Business & Research Support System) and the text "Oracle Basics" in a large blue box. Below this, a red box contains the text "Track 2 End User Training" and "August 2003".

Oracle Basics

Track 2 End User Training
August 2003

Lesson Objectives



Lesson Objectives

In this lesson, you will learn how to:

- Access the NIH Portal to Log into Oracle
- Identify main areas of the Oracle windows
- Identify important toolbar buttons and menu paths
- Search for existing records
- Exit Oracle

Accessing the NIH Portal





Accessing the NIH Portal

In this lesson, you will learn how to:

➔ **Access the NIH Portal to log into Oracle**

- Identify main areas of the Oracle windows
- Identify important toolbar buttons and menu paths
- Search for existing records
- Exit Oracle

Accessing Oracle via the NIH Portal

**nbrss**
NATIONAL INSTITUTES OF HEALTH
BUSINESS & RESEARCH SUPPORT SYSTEM

Accessing Oracle via the NIH Portal

- Oracle is a web-based application available via the NIH Portal
- NIH Portal website: <http://my.nih.gov>
 - To Log on use your:
 - NIH Domain
 - User Name
 - Password
 - For assistance, contact NIH Help Desk at 6-HELP (301.496.4357)
- Add the Budget & Finance Community, which is the page where the Oracle application resides
- Select the **NBS Production** link to launch the application.

NBRSS Application Launcher
NBS Finance
▶ [Production](#)
General Ledger, Fed Admin, Projects

Page 3

Logging in to the NIH Portal

NIH Login

- 1 Select your domain: [Which domain should I select?](#)
- 2 User name:
Password: [Change Password](#)

Log in

Warning Notice

This is a U.S. Government computer system, which may be accessed and used only for authorized Government business by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil, and/or administrative action.

All information on this computer system may be intercepted, recorded, read, copied, and disclosed by and to authorized personnel for official purposes, including criminal investigations. Such information includes sensitive data encrypted to comply with confidentiality and privacy requirements. Access or use of this computer system by any person, whether authorized or unauthorized, constitutes consent to these terms. There is no right of privacy in this system.

Please e-mail questions or comments to tasc@nih.gov or call 301-594-6248

Page 4

Follow the steps below to access the NBS Travel System application from the NIH Portal.

- Launch Internet Explorer. In the browser, navigate to the NIH Portal at <http://my.nih.gov>. (Note: If you need Internet Explorer installed on your computer, please contact the NIH Help Desk at 6-HELP (301-496-4357))
- Log onto the NIH Portal according to the steps listed below, using the account information you currently use to log on to Windows at your workstation.
 - Select your **domain** from the pull-down menu. (Hint: Use the "Which domain should I select?" link for assistance.)
 - Enter your **User Name**.
 - Enter your **Password**.
 - Click the **Log in** button.

For Portal account and password assistance, contact the NIH Help Desk at 6-HELP (301-496-4357)

Adding a Community to your NIH Portal View

The screenshot displays the NIH Portal interface with the following elements and numbered steps:

- Step 1:** Click on the "Communities" tab in the top navigation bar.
- Step 2:** Click on "Edit Your Memberships" in the left sidebar.
- Step 3:** Check the box next to "NBRSS BudgetFinance" in the "Browse for Communities" list.
- Step 4:** Click the "ADD TO MY MEMBERSHIPS >>" button for the selected community.
- Step 5:** Click the "Finish" button in the top right corner.

The interface also shows a "Document Search" bar, "Search Options" (Advanced, Network, Saved), and a "Your Community Memberships" section on the right.

What is a Portal Community and how do I subscribe to a Portal Community?

Portal Communities provide content, documents and application access to users who have a common area of interest. Once you subscribe to a community, it will appear in the list on your Communities tab every time you visit the NIH portal. Follow the steps below to subscribe to a community.

1. Click on the “**Communities**” tab and select “**Edit Your Memberships**”.
2. **Locate a community** of interest either by clicking a folder to browse for communities or by entering a key word in the Search field and clicking "Go" to look for a specific community.
3. Once you locate a community of interest, **select it** by clicking in the box next to the community name.
4. Click “**Add to my Memberships**”. (You may need to select your default community.)
5. Click “**Finish**”. The subscribed community will now appear in the list on your “Communities” Tab every time you access the portal.

Form Terminology

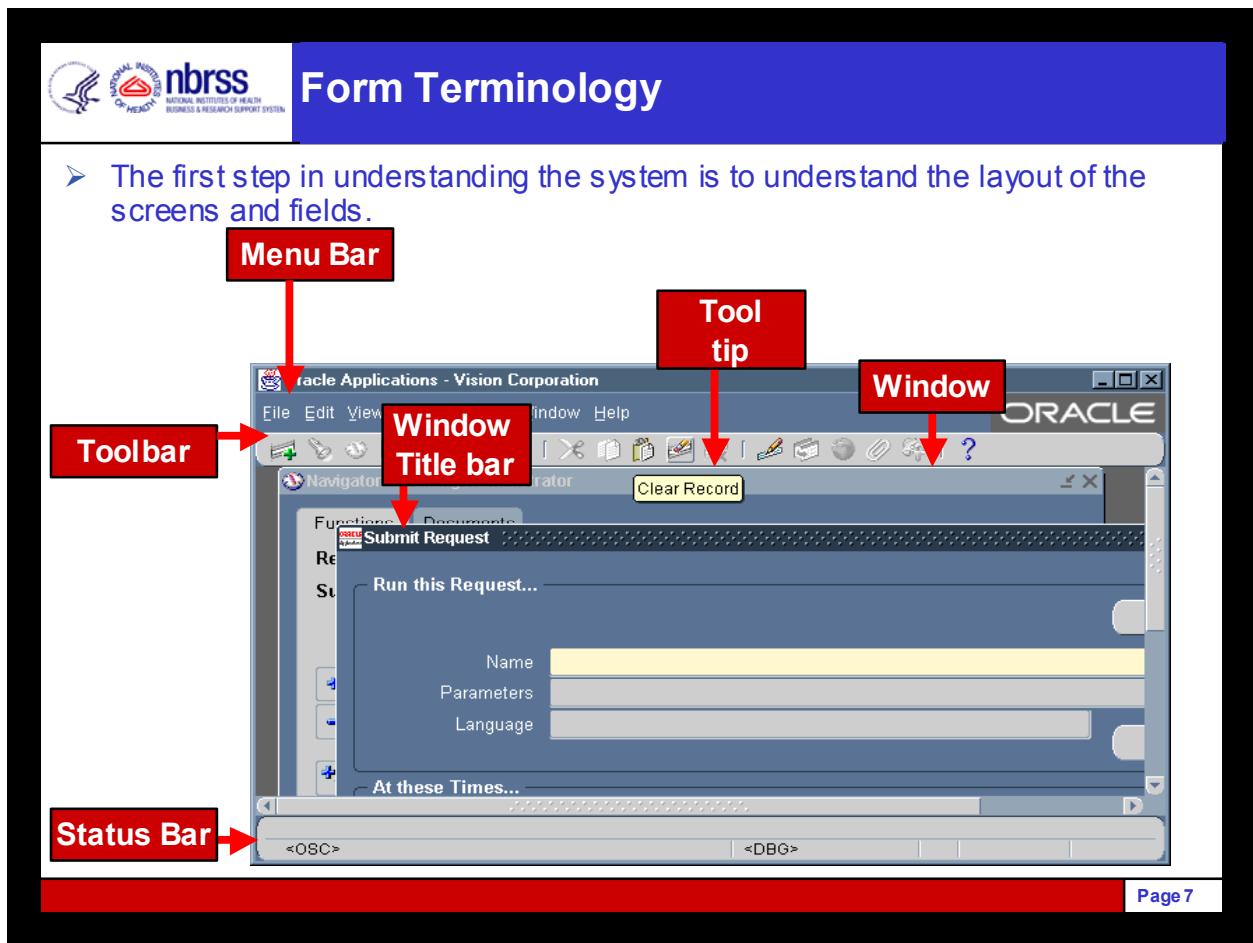


Form Terminology

In this lesson, you will learn how to

- Access the NIH Portal to Log into Oracle
- ➔ **Identify main areas of the Oracle windows**
- Identify important toolbar buttons and menu paths
- Search for existing records
- Exit Oracle

Form Terminology



Form Terminology

Oracle Applications Release 11i works specifically in a Web-enabled environment. It is important to understand the terminology of the components within an Oracle Applications form. Common terms used in Oracle Applications forms are listed below.

Menu bar—Use pull-down menus from this menu bar to navigate or perform actions within a form

Toolbar – Use icons from the bar to navigate or perform actions within a form

Window—An area where the user interacts with an application (Many windows can be open at one time and you can access these “overlapping” windows to perform data entry or data search activities.)

Window title bar—Text in the title bar that indicates the name of the window, and usually, context information pertinent to the information in that window

Tool tip—Iconic bubble help that you can use to determine the function of a button on the toolbar. Appears when cursor is held over the icon.

Status Bar - The status line displays status information and pertinent information for processing your form.

Form Terminology

The screenshot shows a software window titled "nbrss" with a blue header bar. The window contains a form with various fields and buttons. Red boxes with arrows point to specific elements: "Region" points to the top header area; "Region tab" points to the "Periodic" tab; "Field" points to the "On Demand" dropdown menu; and "Button" points to the "Run" button. The form includes fields for "Application", "Description", "Name", "Enabled", "Frequency", "Start Time", "End Date", "Last Checked", and "Check Interval". A large text area contains the SQL statement: `SELECT COLUMN_NAME INTO &OUTPUT1 FROM TABLE_NAME`. The bottom of the window has a red bar with the text "Page 8".

Form Terminology (continued)

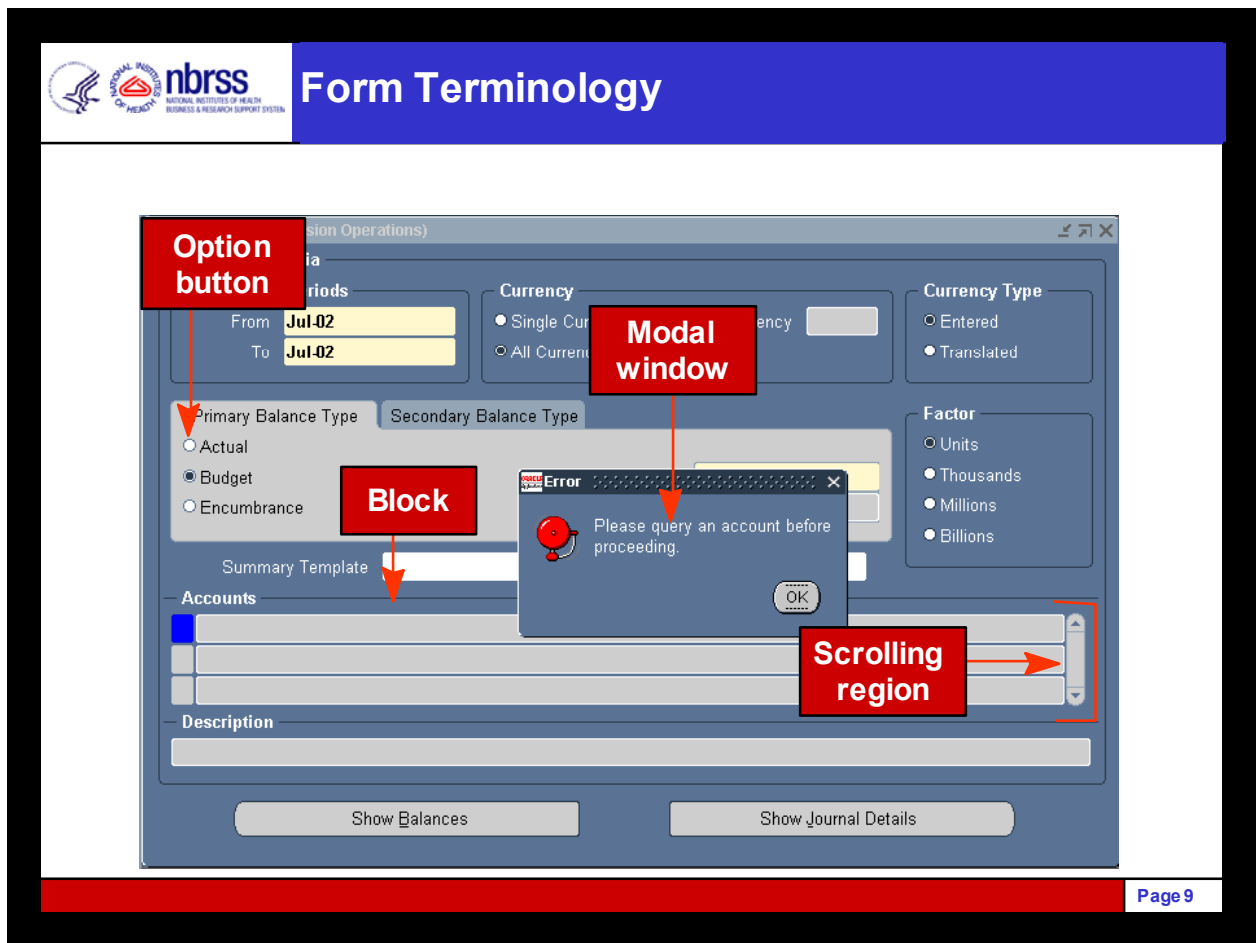
Region—A logical grouping of fields set apart from other fields by a box outline

Region tab—A collection of regions that occupy the same space in a window where only one region can be displayed at a time

Field—An area in a window that displays data or enables you to enter data

Button—A graphic element that initiates a predefined action when you click it

Form Terminology



Form Terminology (continued)


Option button—A button that indicates an individual selection is available within an option group

Modal window—A window that requires you to act on its content *before continuing*

Scrolling region—A region, containing a scroll bar, in which to view other fields

Block—An area of information relative to a specific business function or entity

Field Colors

**Field Colors**

➤ Field colors indicate the attributes of the field.

Field Color	Description
White	Allow data entry
White with Green Text	Indicate drill-down capability
Yellow	Require data entry
Gray with black text	Are display only
Blue	Indicate fields to use in Query-Enter mode

Page 10

What Field Colors Indicate

Each block contains fields you use to enter, view, update, or delete information. A field prompt describes each field by telling you what kind of information appears in the field or what kind of information you should enter in the field. Fields are color coded to indicate their type as follows:

White Fields—allow data entry

White Fields with Green Text—indicate drill-down capability

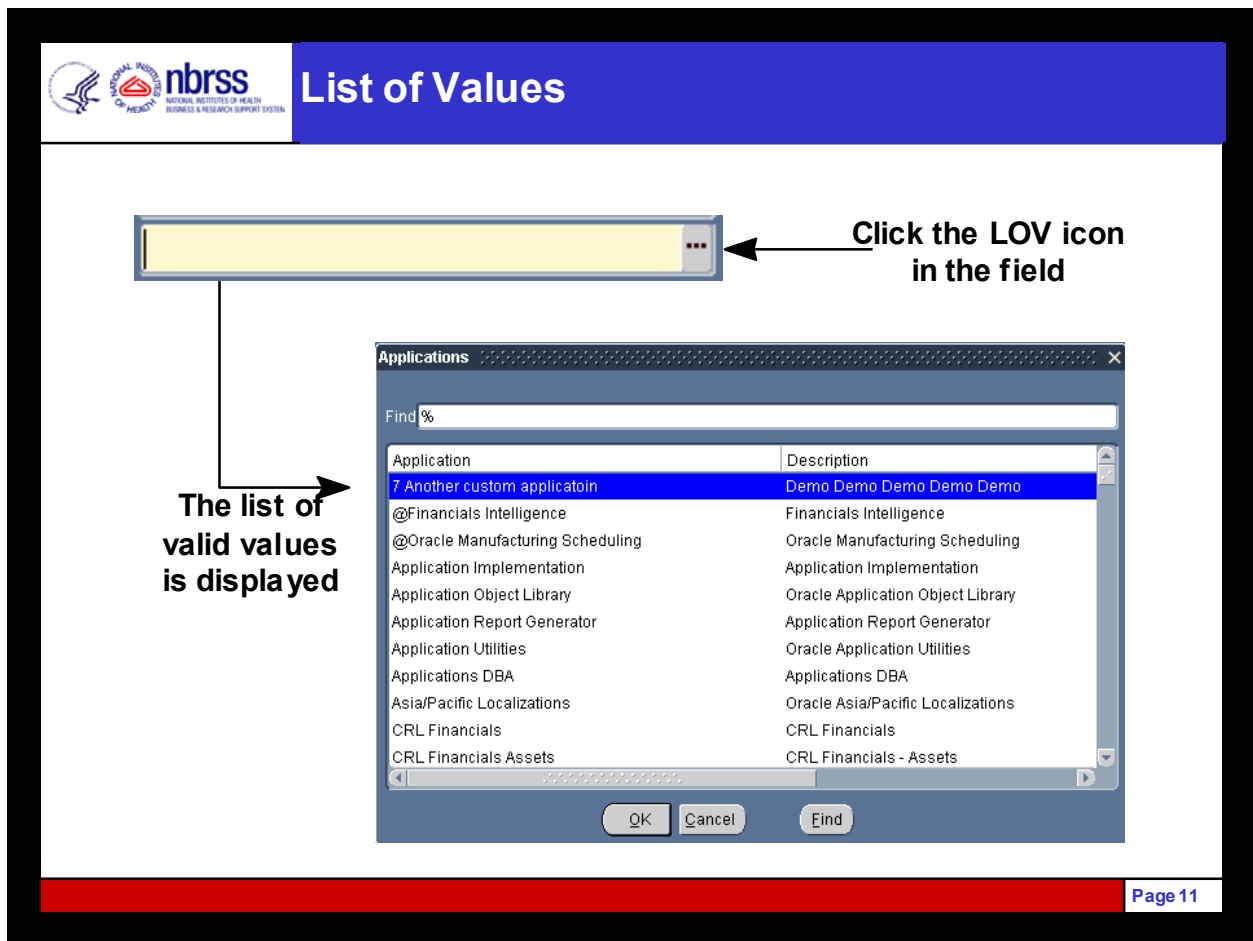
Yellow Fields—require data entry

Gray Fields with Black Text—are display-only

Blue Fields—indicate fields to use in Query-Enter mode

The term field generally refers to a text field, an area in a window that either displays data or allows you to enter data. However, a field can also include a button, check box, option group, or poplist.

List of Values



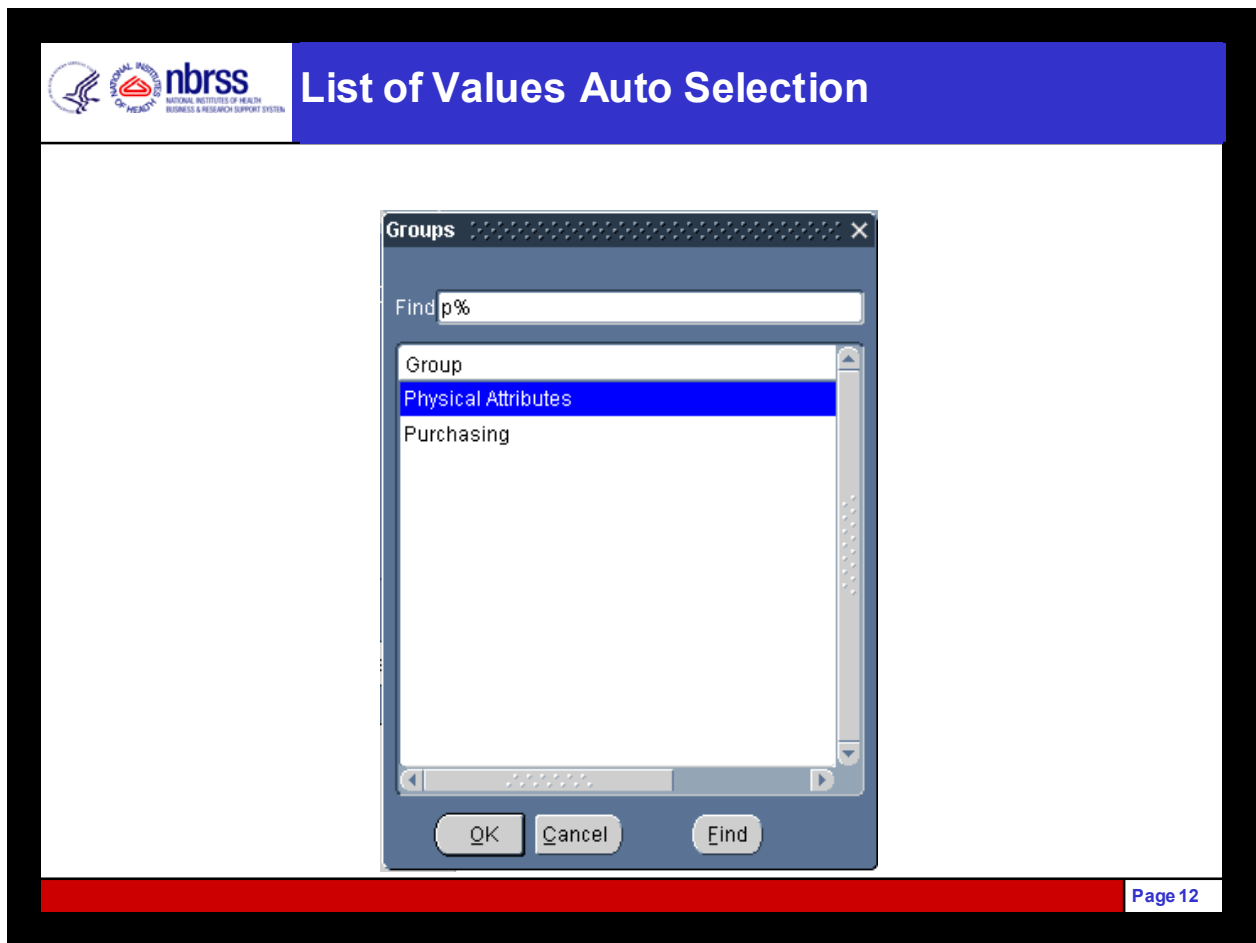
Using the LOV

The List of Values (LOV) feature is very useful while entering data in Oracle Applications. It provides you with a powerful, easy-to-use data entry method that increases your accuracy and productivity. Using the LOV makes data entry an easy task for novice users, and experienced users can enter correct data with a minimum number of keystrokes.

Oracle Applications notifies you when a list of acceptable input values is available for a field by displaying the LOV icon in the field. When you display a list, the values appear in a window with a title that describes the contents.

By using the LOV feature, you can save time and enter data quickly without having to memorize or look up valid data for each field. You can choose data from an online list of valid input choices whenever you want. Additionally, you are relying on Oracle Applications to validate your input since you will know right away if your entry does not match an option from the LOV.

List of Values Auto Selection



AutoSelection

Using the **LOV** feature called AutoSelection you can select a valid name from the list with a single keystroke. When you display the list window, you can type the first character of the name you want in the **Find** field. If only one choice begins with the character you enter, AutoSelection selects the choice, closes the list window, and enters the value in the appropriate field.

List Search

You can use the AutoReduction feature to reduce a list when you know the first few characters of your name selection. If you do not know the initial characters of your choice, but do know that your choice contains a certain word or set of characters, you can perform a list search to reduce a list.

In the list window, enter any group of characters as search criterion in the Find field and click the Find button. You can use wildcard characters such as the percent sign (%) which represents any number of characters, or an underline (_), which represents a single character in your search criterion.

For example, to reduce a list to only those choices that contain the phrase “schedule,” you would type %schedule% in the Find field and click Find. In any of these list search queries, it does not

matter whether you use uppercase or lowercase letters as the search is not case sensitive. Oracle searches all of the columns in the list.

Long-List Fields



Long-List Fields

If a field has a “long-list”—that is, a list of more than 100 values—when you try to display the LOV, Oracle Applications will display a window where you can enter list reduction criteria.

Because it takes less time to display a reduced list than a complete long-list, Oracle Applications prompts you to enter the first few characters that occur in your value of interest to reduce the complete list. However, to view the entire long-list, enter the percent sign (%) at the prompt and all of the values will be displayed.

Note: To avoid excessive network traffic and reduced performance, try to enter specific criteria, other than just a percent sign (%), whenever possible.

Power List

The Power List feature provides an even faster method of data entry. If a field displays a List icon and you know the value you want, simply enter the first few characters of the value in the field and press [Tab]. Power List will complete the entry for you. You can also include wildcard characters with your entry. You do not need to display the list window. If more than one value matches the characters you specify, a list window containing those values is displayed. If no values match the characters you enter, a list window containing all the values appears.

Using Calendars

Choose a month

Choose a year

Choose a day

11/MAY/2001

12: 00 AM PM

OK Cancel

Page 14

Choosing a Date in the Calendar Window

Values in a date field can be typed directly or you can use a calendar to enter a valid value in a date field if the field displays the **LOV** icon. If your date field supports time, you can also use the Calendar window to choose a valid time with the date.

1. Put your cursor in a date field.
2. Click the List icon to display the Calendar window. The date value that appears below the calendar is called the *selected date*, which is either the value already in the field, the default value of the field, or the current system date.
3. Click on a date.

Note: Disabled buttons that show dimmed text represent invalid days, which cannot be chosen. Similarly, if a date field is display only, you can display the Calendar window for the field, but you cannot change the date shown on the calendar.

4. Click OK to accept the selected date and close the window.
5. Click Cancel if you want to close the window without choosing a date.

Application Toolbar

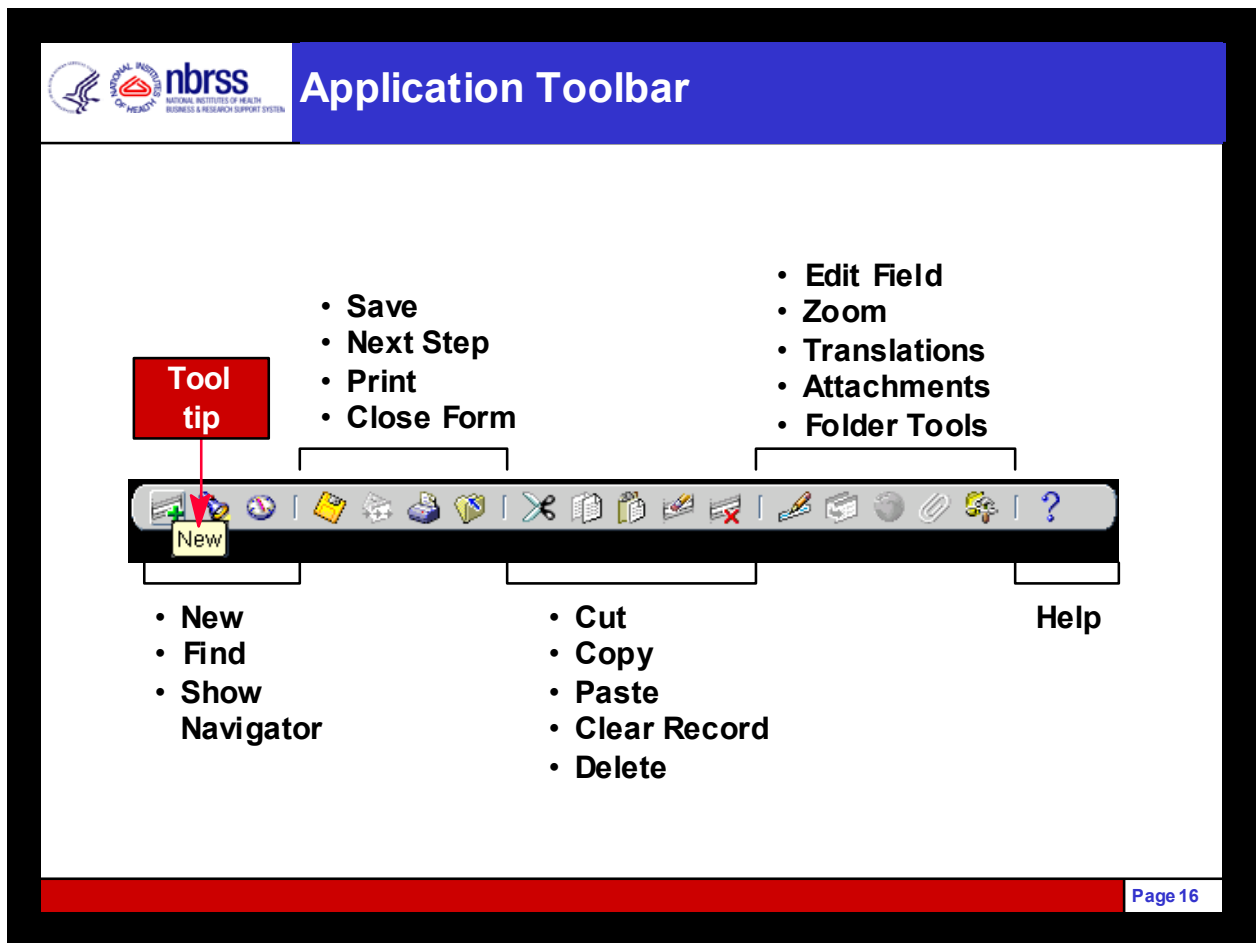


Application Toolbar

In this lesson, you will learn how to

- Access the NIH Portal to Log into Oracle
- Identify main areas of the Oracle windows
- ➔ **Identify important toolbar buttons and menu paths**
- Search for existing records
- Exit Oracle

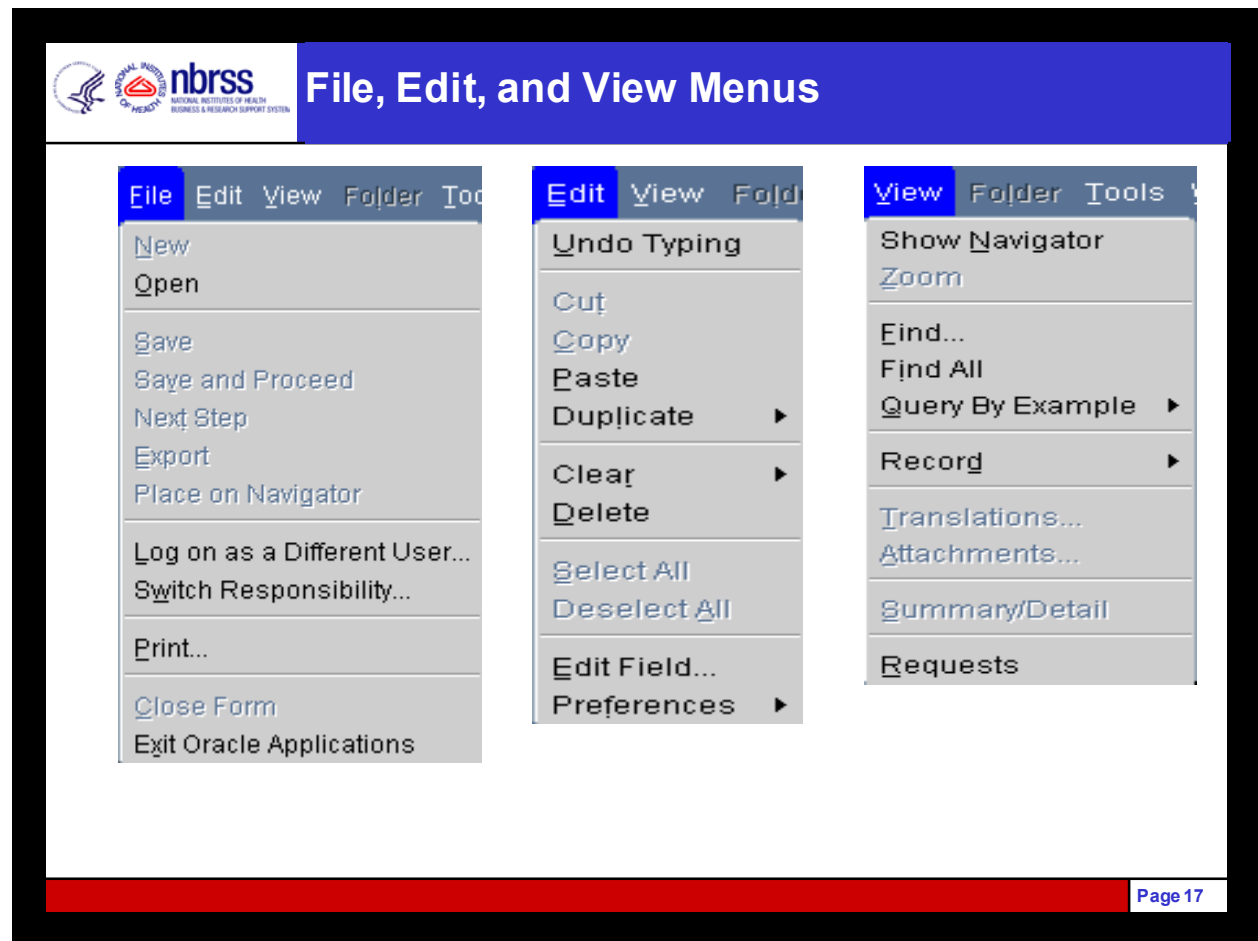
Application Toolbar



Using the Toolbar

The toolbar is a collection of iconic buttons, where each button performs a specific action when you choose it. Each toolbar button replicates a commonly-used menu bar item. Depending on the context of the current field or window, a toolbar button can be enabled or disabled. You can display help or a tool tip for an enabled toolbar button by holding your mouse over the button.

File, Edit, and View Menus



M > File

Save—Saves any pending changes in the active form.

Save and Proceed—Saves any pending changes in the active form and advances to the next record.

Export—Exports information in your current form to a browser.

Switch Responsibility—Allows you to change the responsibility in effect for your current log on.

Print...—Prints your current window.

Close Form—Closes all windows of the current form.

Exit Oracle Applications—Quits Oracle Applications.

M > Edit

Undo Typing—Undoes any typing done in a field before the field is exited and returns the field to the most recent value.

Clear Record—Erases the current record from the window.

Clear

Field—Clears the data from the current field.

Block—Erases all records from the current block.

Form—Erases any pending changes from the current form.

Select All—Selects all records (for blocks with multi-select).

M > View

Show Navigator—Displays the Navigator window.

Find All—Retrieves all records.

Requests—Displays the Request window.

Searching for Existing Records

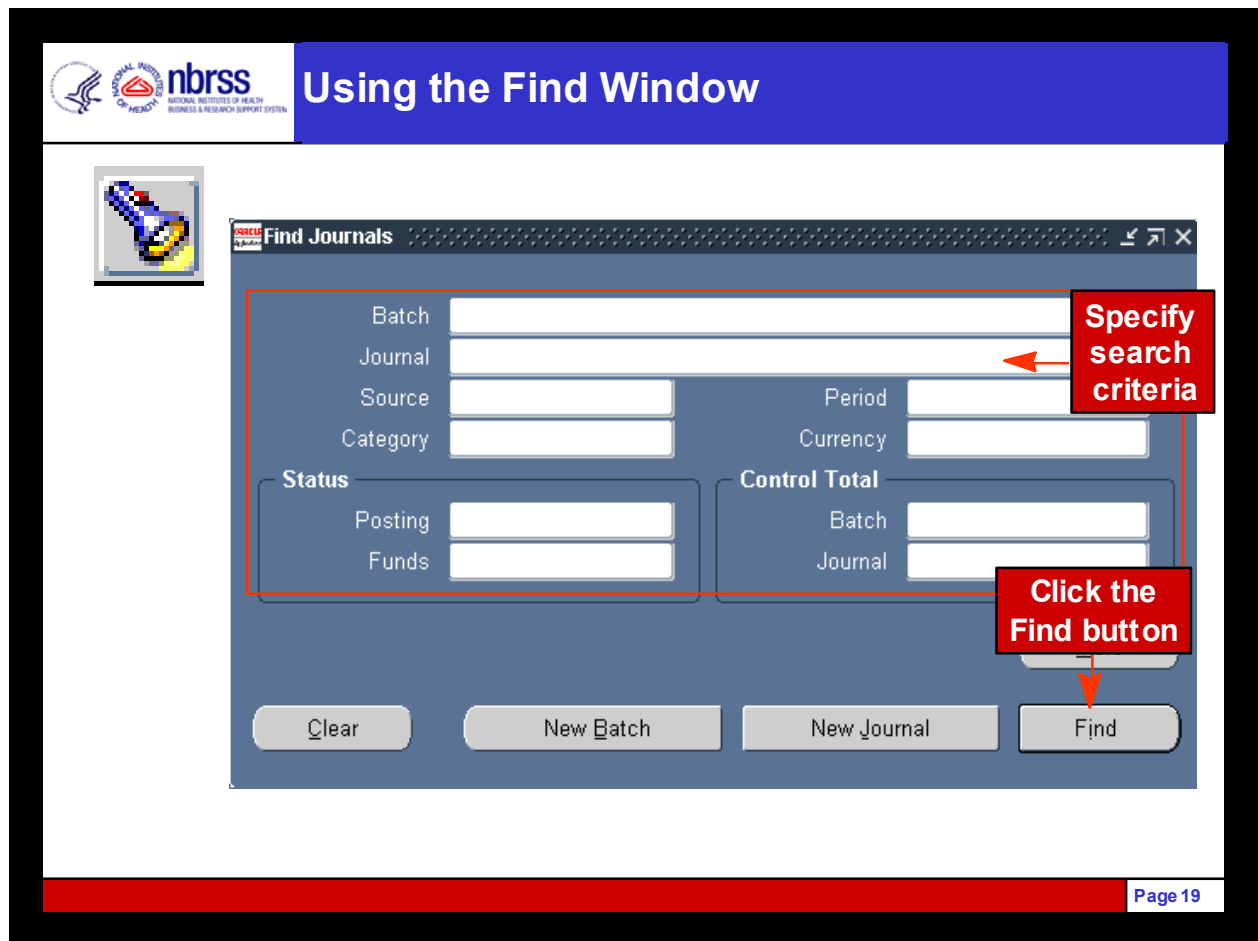


Searching for Existing Records

In this lesson, you will learn how to

- Access the NIH Portal to Log into Oracle
- Identify main areas of the Oracle windows
- Identify important toolbar buttons and menu paths
- **Search for existing records**
- Exit Oracle

Using the Find Window



Using the Find Window

1. (M) View > Find or click the Find icon on the toolbar.
2. Enter your available search criteria in the appropriate fields of the Find window.
If a field does not provide a list of values for you to choose from, you can enter wildcard characters (%) and (_) in the search phrase. You cannot, however, use query operators (such as >, <, and so on) in a Find window.
3. Click the Find button to find any matching records.
4. Click the Clear button to clear the current search criteria from the Find window so you can enter new search criteria.
5. Click the New button to enter a new record in your current block if your search finds no matching records. Not all windows support this.

Query Results

Query Results

Your search results will be displayed on the screen.
Your status bar will indicate the total number of records retrieved.

Enter Person

Name

Last Name: JONES
First: JENNIFER
Middle: A
Title:

Identifier

Employee Number: PP00003659
Social Security: 111-88-7777

Gender

☒ Male ☐ Female ☐ Unknown

Employment Dates

18 JUN 2003

Personal Information

Birth Date:
Email:
Mail: Home Work Telephone:
Mgre ...

FRM-40301: Query caused no records to be retrieved. Re-enter.
Record: 1/1 Enter-Qu... <OSC>

Page 20

Reviewing Your Data

After a search, Oracle Applications retrieves any records that matched your search criteria. Always enter the most selective search criteria that you can.

How to Review Retrieved Records


Use the scroll bar or the down arrow on your keyboard to view additional records currently not visible on the screen in a multirecord block.

(M) View > Record First to see the first record.

(M) View > Record Last to see the last record.

Note: Scrolling through records and using the Record Last command uses significant system resources. Avoid this by entering selective search criteria.

Searching for Data Using Query Mode



Searching for Data Using Query Mode

Enter Person

Name

Last Name

First

Middle

Title

Identifier

Employee Number

Social Security

Gender

Male

Female

Unknown

Employment Dates

Birth Date

Mail

Email

Work Telephone

More ...

Page 21

1. Select the **F11** key (Fields turn blue)
2. Enter your search criteria, using % wildcard
3. Select the **Ctrl + F11** keys
4. Review the retrieved records

Exiting Oracle



Exiting Oracle


In this lesson, you will learn how to

- Access the NIH Portal to Log into Oracle
- Identify main areas of the Oracle windows
- Identify important toolbar buttons and menu paths
- Search for existing records

→ Exit Oracle

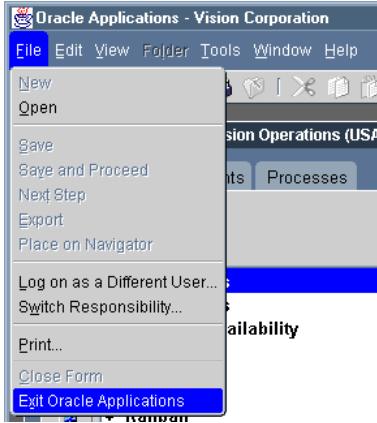
Page 22

Logging Out of Oracle



Logging Out of Oracle

- (M) File > Exit Oracle Applications
- Use this method so that your username is cleared from system access.



Page 23

Exiting Oracle Applications

(M) File > Exit Oracle Applications, to log off the system. It is important to exit the system in this manner, rather than any other, as this is the only way to ensure that your user name is cleared from system access.

Logging Out of Oracle



Logging Out of Oracle

Close the Oracle Applications 11i window by selecting the X in the upper right hand corner.



Copyright ©1998, 1999, 2000, 2001, 2002 [Oracle Corporation](#)

Page 24

Lesson Summary



Lesson Summary

In this lesson, you learned how to

- Access the NIH Portal to Log into Oracle
- Identify main areas of the Oracle windows
- Identify important toolbar buttons and menu paths
- Search for existing records
- Exit Oracle

Entering Bethesda Clinical Center Patient Travelers

Chapter 5

Entering Bethesda Clinical Center Patient Travelers



Entering Bethesda Clinical Center Patient Travelers

Track 2 End User Training
August 2003

Lesson Objectives



Lesson Objectives

After this lesson you should know how to:

- Enter New Bethesda Clinical Center Patient Travelers
- Update Bethesda Clinical Center Patient Records
- Manually Execute Scheduled Processes

Entering New Patient Travelers



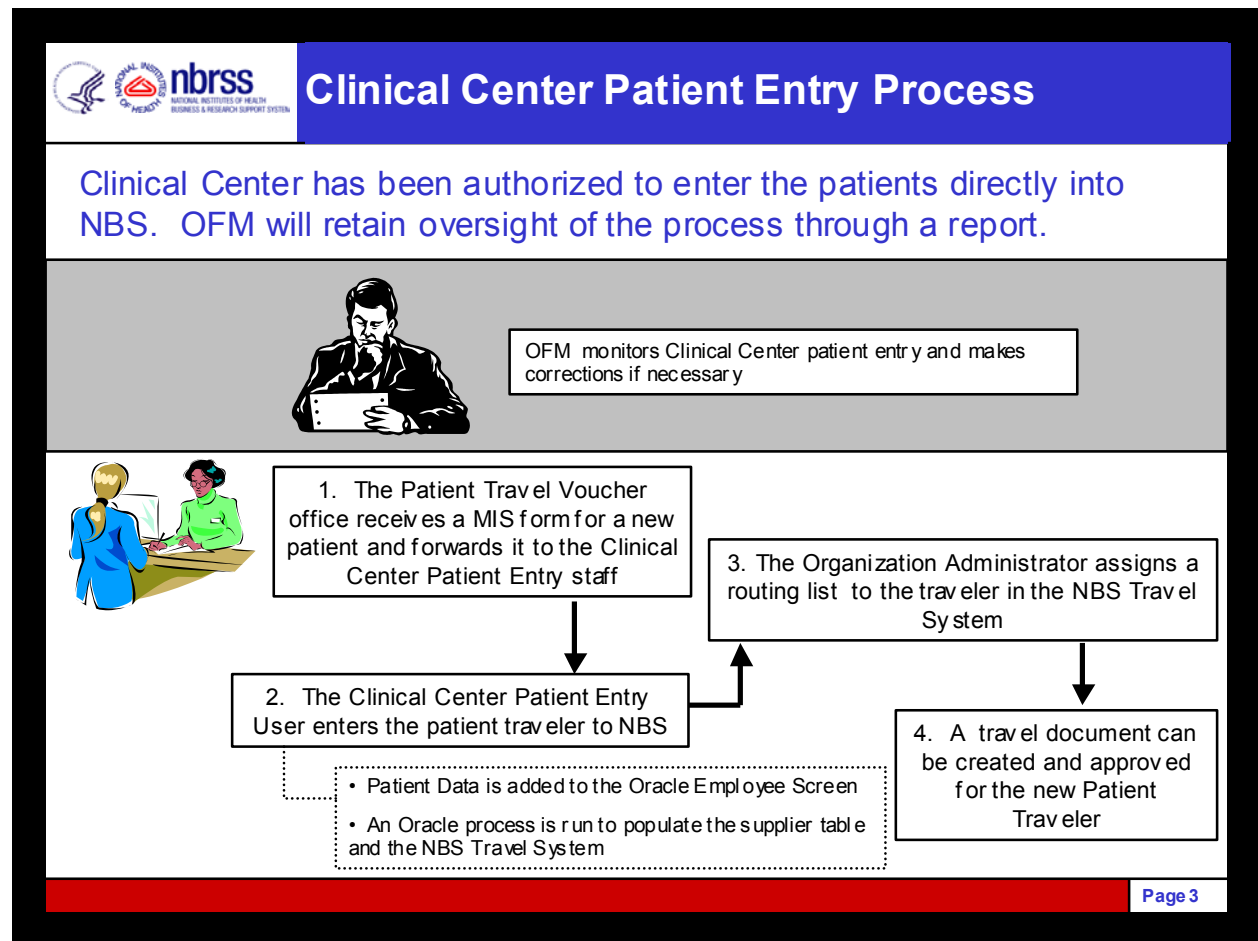
Entering New Patient Travelers

After this lesson you should know how to:

→ Enter New Bethesda Clinical Center Patient Travelers

- Update Bethesda Clinical Center Patient Records
- Manually Execute Scheduled Processes

Clinical Center Patient Entry Process



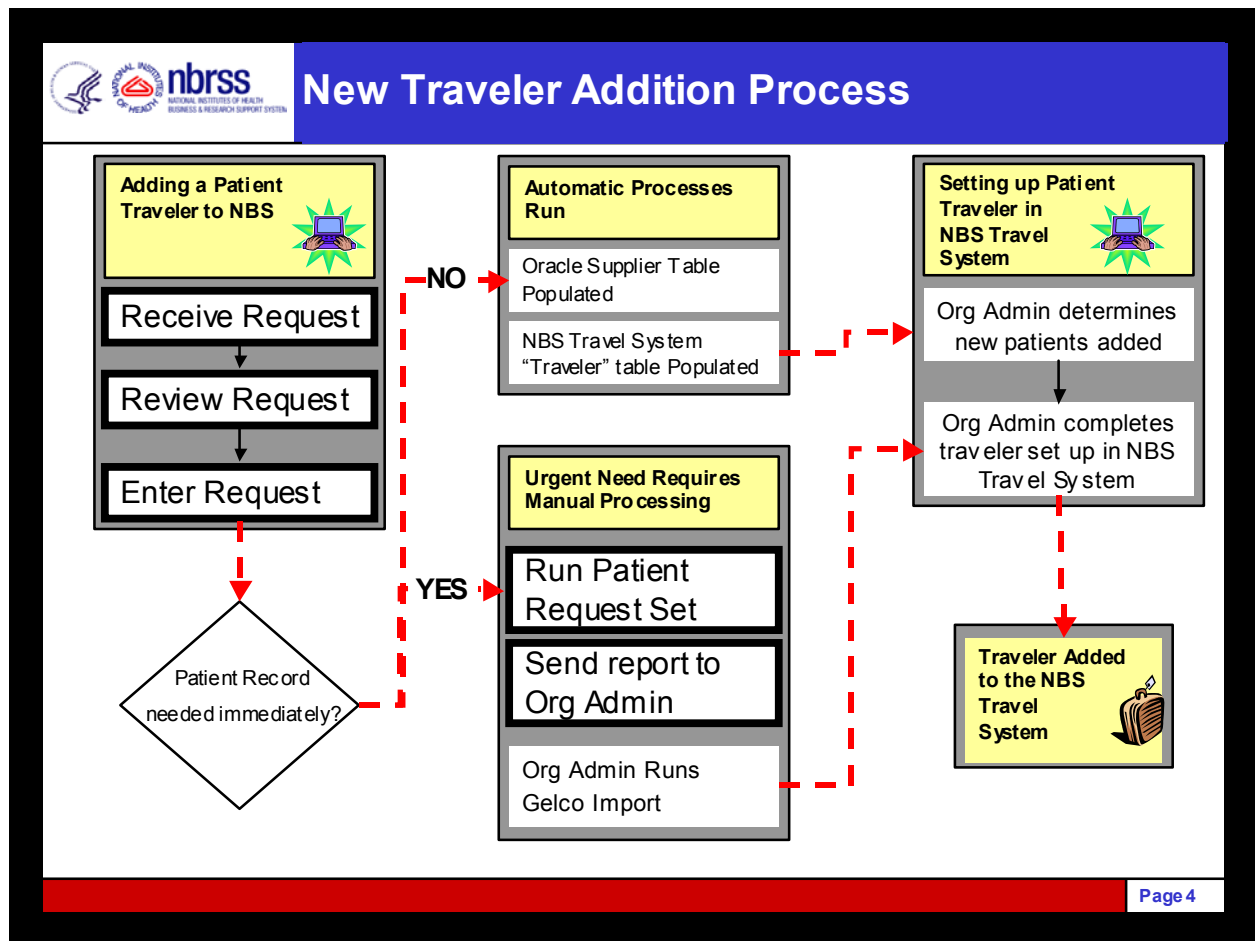
The Clinical Center in Bethesda is responsible for entering new patients that travel to the Clinical Center into Oracle HR.

A process will run periodically to send new traveler information to the NBS Travel System.

The Clinical Center Organization Administrator is responsible for setting up the traveler profiles for the newly-added patient travelers and assigning a routing list.

OFM is responsible for general oversight of the Clinical Center's patient entry to ensure that guidelines and standards are followed.

Option 3: Oracle Extension




The Clinical Center Voucher Office will inform the Clinical Center Patient Entry staff that a new traveler is required by providing them with a copy of the MIS form.

The Clinical Center Patient Entry Staff is responsible for entering the patient in the NBS.

The Organization Administrators for the Clinical Center are responsible for setting up the patient traveler's profile in the NBS.

In addition, if the need to enter a travel document in the NBS is urgent (ie. You cannot wait for the traveler's data to be passed to the Gelco Traveler Tables), the Clinical Center Patient Entry staff and the CC Org Admin can manually execute the processes.

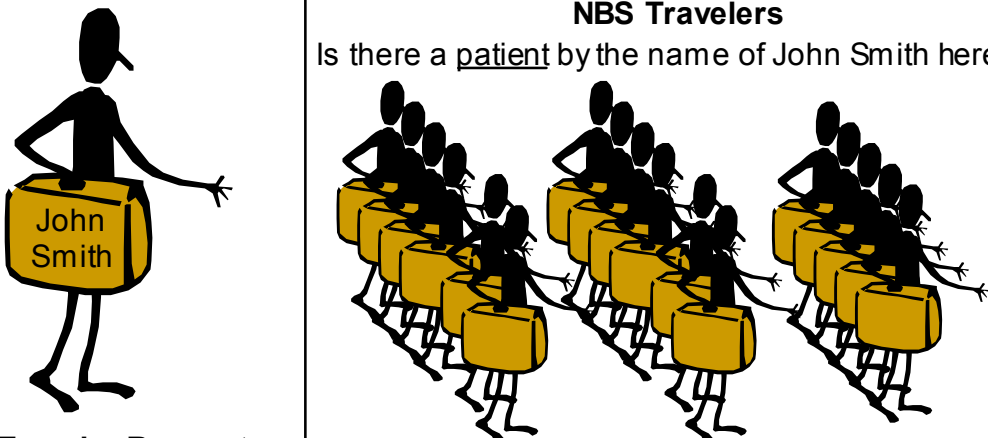
Search NBS for Existing Records

**nbrss**
NATIONAL INSTITUTE OF HEALTH
BUSINESS & RESEARCH SUPPORT SYSTEM

Search NBS for Existing Records

Before entering a new patient, we recommend checking the database to see if a patient record already exists.

2. Review request



New Traveler Request

NBS Travelers
Is there a patient by the name of John Smith here?

Page 5

We suggest that you search by both the person's name and social security number to ensure that the person is not an existing patient in the NBS.

Note: If the person has already been entered into the system but does not have a patient record, the individual must be entered into the system as a patient in order for their payments to process correctly.

Searching for Existing Records

**nbrss**
NATIONAL INSTITUTE OF HEALTH
BUSINESS & RESEARCH SUPPORT SYSTEM

Searching for Existing Records

2. Review request

Enter Person

Name

Last Name

First

Middle

Iden

Full Name

Number

Social Security

Location

Supervisor

Per

Clear

New

Find

Mgre ...

Find Employees

Full Name

Number

Social Security

Location

Supervisor

Clear

New

Find


Page 6

Before you enter a new patient traveler, you should ensure that the person does not already exist as a patient in the NBS.

Use the **Find** button on the application toolbar to access the **Find Employees** window.

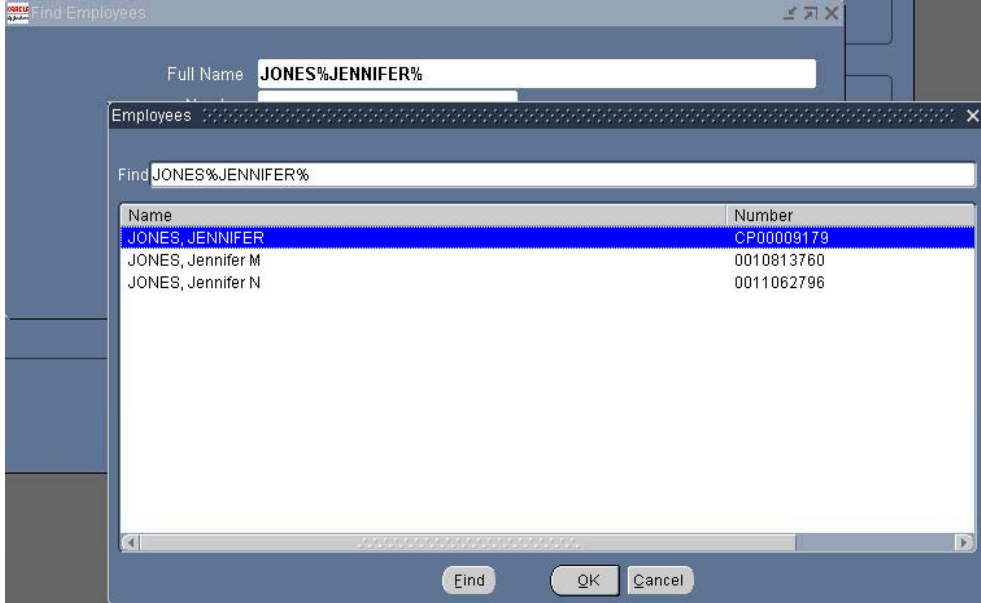
We will use the **LOV** for the **Full Name** and **Social Security** fields to search for existing person records.

Searching for Existing Records by Name



Searching for Existing Records by Name

2. Review request



Name	Number
JONES, JENNIFER	CP00009179
JONES, Jennifer M	0010813760
JONES, Jennifer N	0011062796

Page 7

1. Enter the person's partial name in the **Full Name** field with appropriate wildcard characters.
Note: Search for the name using last name%first name%
2. Press the **Tab** key.
3. Review the results of the **LOV**.

If multiple records exist for this name or partial name, they will appear in a **LOV** as displayed above.


If the LOV does not contain a record whose number begins with either CP or CONV, then you may enter a new record after searching for the SSN.

If the LOV contains a record whose number begins with either CP or CONV, search for the person's social security number to ensure that the person matches the existing patient record. If so, reject the request.

If a single record exists for this name or partial name, the **Number** field will default. Follow the same instructions as above.

If the status bar indicates that the value you entered is not a valid value, then no records exist for this name. Search for the person using their SSN to verify that this is not a duplicate request.

Searching for Existing Records by Social Security Number



Searching for Existing Records by Social Security Number

2. Review request

Find Employees

Full Name

Number

Social Security 222-44-7777

Location

Supervisor

Clear

New

Find

Page 8

1. Enter the person's social security number in the **Social Security** field
2. Press the **Tab** key.
3. Review the SSN and names of existing records.

If multiple records exist for this SSN, they will appear in a **LOV**.

If the LOV does not contain a record whose number begins with either CP or CONV, then enter a new record.

If the LOV contains a record whose number begins with either CP or CONV, then reject the request as it is a duplicate.

If a single record exists for this SSN, the **Full Name** field will default. Follow the same instructions as above.

If the status bar indicates that the value you entered is not a valid value, then no records exist for this SSN. If you have searched the database for the patient's name, then you may now enter the new patient.

Searching for Employees

NIH Payables Manual Vendor Entry User

N > Employees > Enter Employees

Enter Person

NIH Phoenix Patient Entry User

NIH Baltimore Patient Entry User

NIH Clinical Center Patient Entry User

NIH Non Affiliates Entry User

N > Enter Person

Enter Person

Enter Person

Name

Last Name

First

Middle

Title

Identifier

Employee Number

Social Security

Gender

☒ Male ☐ Female ☐ Unknown

Employment Dates ----

Personal Information

Birth Date

Mail

Email

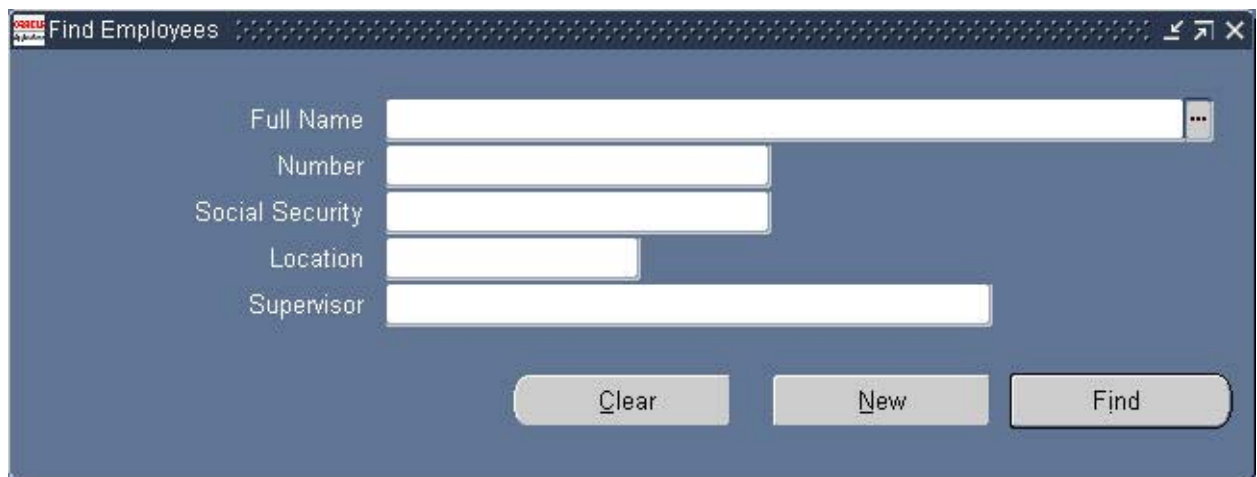
Work Telephone

[]

More ...

1. Press the  **Find** button on the application toolbar.

Result: The **Find Employees** window is displayed.



Find Employees

Full Name

Number

Social Security

Location

Supervisor

Clear New Find

2. Enter the search criteria.

- Enter the individual's social security number in the **Social Security** field. Be sure to use the correct format (NNN-NN-NNNN)
- Enter the person's partial name by typing the last name first followed by a % and then the first name. Example: JONES%JENNIFER.
- Press the Tab key

Results: You will receive one of the following results:

- The status bar will indicate that the **LOV** contains no such values if no record matches your search criteria.
- The **Full Name** and **Number** fields will display the information for the person matching your search criteria if one record matches your search criteria
- The **LOV** search results are displayed if multiple records match your search criteria.

The screenshot shows a window titled 'Employees' with a search bar at the top containing the text '%JONES%JENNIFER%'. Below the search bar is a table with two columns: 'Name' and 'Number'. The table contains three rows of data. The first row is highlighted in blue. At the bottom of the window are three buttons: 'Find', 'OK', and 'Cancel'.

Name	Number
JONES, JENNIFER	CP00009179
JONES, Jennifer M	0010813760
JONES, Jennifer N	0011062796

Note: The **Number** field will display the employee number for the individual. Employee numbers that do not begin with a letter prefix are NIH Affiliated persons. Employee numbers that begin with a letter prefix are as follows:

- CP = Clinical Center Patient
- PP = Phoenix Patient
- BP = Baltimore Patient
- CONV = Converted Patient
- NN = Non-NIH Affiliated

If no records were found, goto task #3.

If multiple records were found, goto task #5. Otherwise, goto task #6.

3. Select the **Clear** button.

4. Close the form by pressing the  **Close Form** button on the application toolbar.

End of activity.

5. Select the record that you want to review and press the **OK** button.

6. Select the **Find** button.

Result: The record matching your search criteria is displayed.

Enter Person

Name

Last Name **JONES**

First **JULIE**

Middle

Title

Identifier

Employee Number **CP00009190**

Social Security **222-88-4456**

Gender

☒ Male ☐ Female ☐ Unknown

Employment Dates **04-DEC-2003** ----

Personal Information

Birth Date

Mail **Home**

Email

Work Telephone


[]

More ...

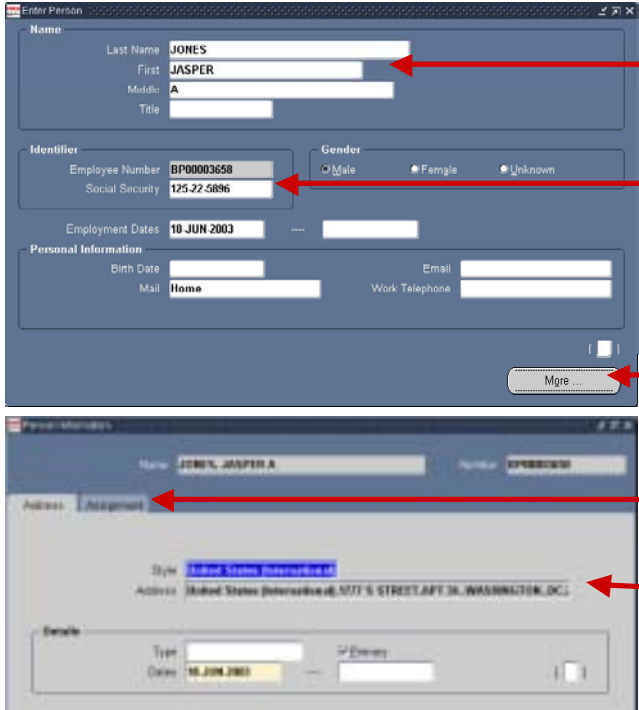
Note: You will only be able to see the record details for those individuals for which you are eligible to enter/request. For example, individuals with **NIH Clinical Center Patient Entry User** responsibility will only be able to view the record details of Clinical Center patient records whose employee numbers begin with **CP**.

End of activity.

Entering A New Patient Traveler



Entering A New Patient Traveler



3. Enter request

1. Enter Patient Name
2. Enter SSN
3. Save the record
4. Select the **More** button
5. Enter the Address Information
6. Confirm the Assignment Information

Page 9

Entering Clinical Center Patients

Purpose

The purpose of this document is to describe how to enter Bethesda Clinical Center patients into the NBS.

NIH Clinical Center Patient Entry User

N > Enter Person

Enter Person

The screenshot shows a web-based form titled "Enter Person". The form is organized into several sections:

- Name:** Includes fields for Last Name, First, Middle, and Title.
- Identifier:** Includes fields for Employee Number and Social Security.
- Gender:** Includes radio buttons for Male, Female, and Unknown.
- Employment Dates:** Includes a date field showing "18-JUN-2003".
- Personal Information:** Includes fields for Birth Date, Mail (set to "Home"), Email, and Work Telephone.

A "More ..." button is located at the bottom right of the form.

1. Enter the patient's last name in the **Last Name** field.
2. Tab to the **First** field and enter the patient's first name.

Result: The **Employee Number** field will be populated with a value beginning with "CP".

3. In the **Social Security** number field enter the patient's social security number or the first available number from the block of pseudo numbers provided by OFM Government Accounting department.

Important: Once you save the record, you will not be able to update the SSN and Name fields. Changes to these fields will require OFM involvement.

4. In the **Gender** block, select the gender of the patient.
5. Revise the employment dates as necessary.

Important: The date in the **Employment Date: From** field must be a date prior to the start date of the trip. Use the **LOV** to update the field.

6. Enter the following in the **Personal Information** block:

Note: These fields are optional.

Field Name	Description
Birth Date	Enter the patient's birth date
Mail	Select Home or Office from the LOV
E-mail	Enter the patient's email address
Work Telephone Number	Enter the patient's work telephone number

Example: Below is a sample completed Clinical Center patient form.

Enter Person

Name

Last Name **JONES**

First **JULIE**

Middle

Title

Identifier

Employee Number **CP00009190**

Social Security **222-88-4456**

Gender

☒ Male ☐ Female ☐ Unknown

Employment Dates **04-DEC-2003** ----

Personal Information

Birth Date

Email

Mail **Home**

Work Telephone

[]

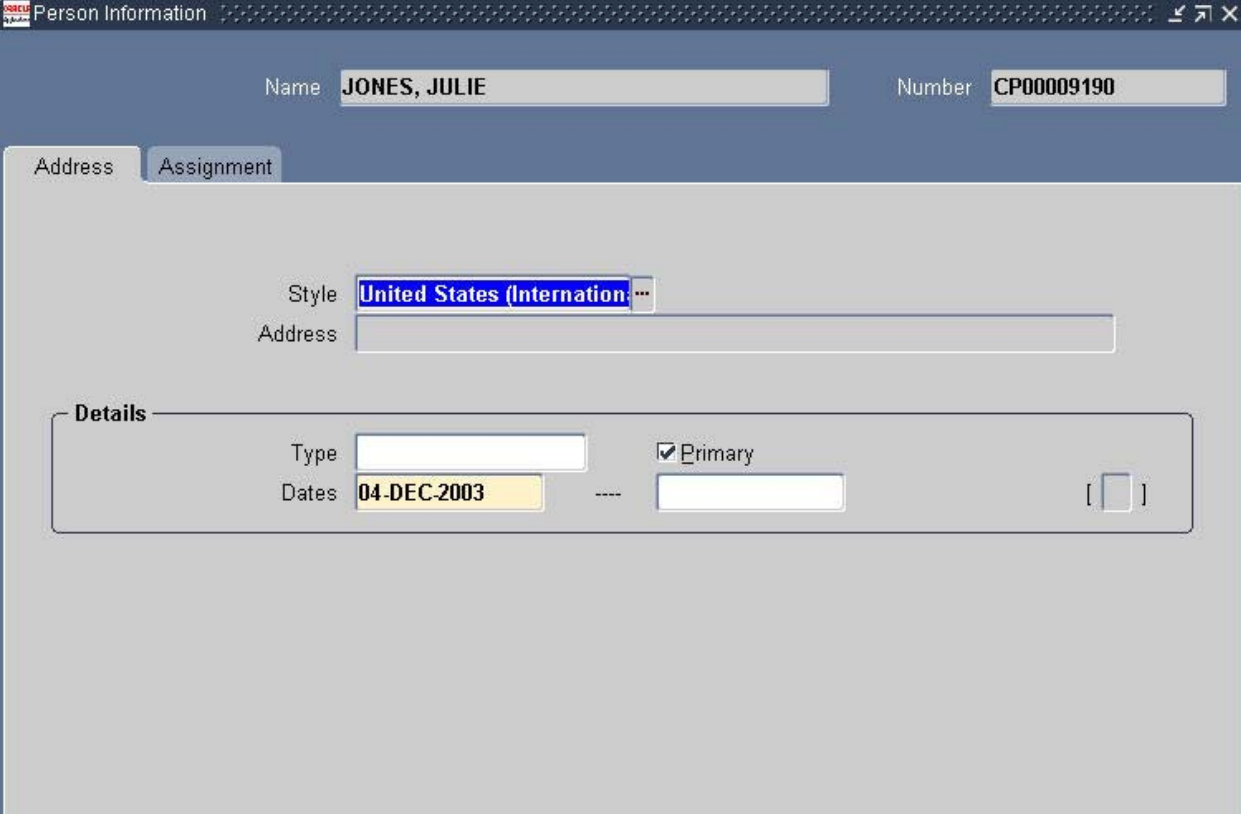
More ...

7. Save your changes.

Note: You must save the record before proceeding to the next step or the system will stop you.

8. Select the **More** button.

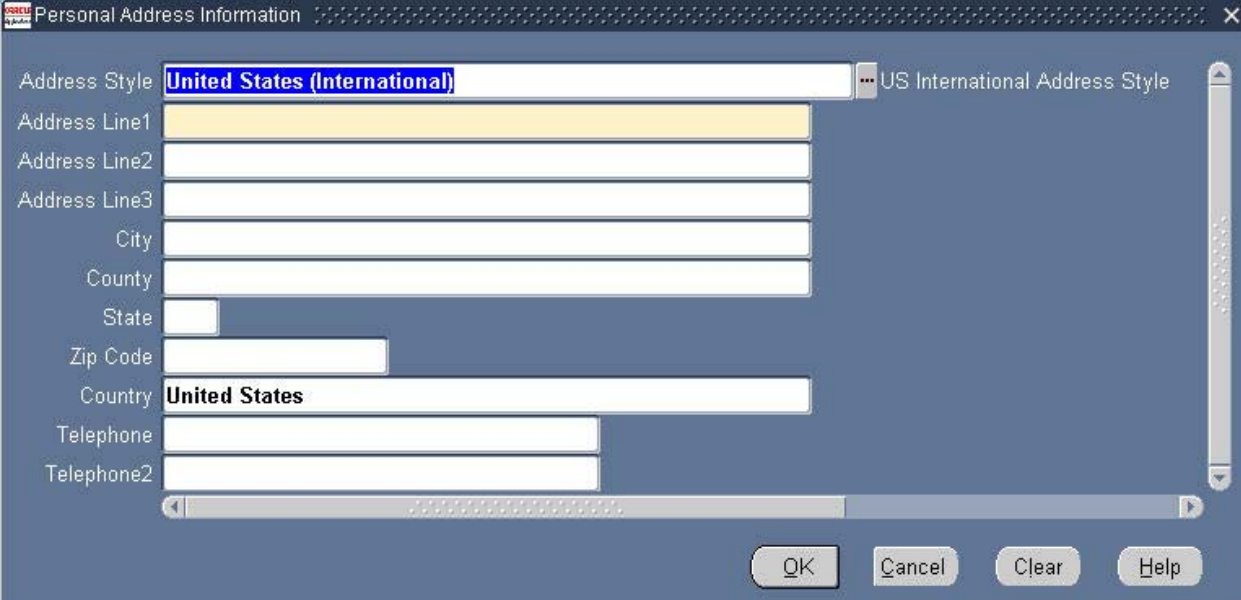
Result: The **Person Information** window is displayed.



The screenshot shows the 'Person Information' window. At the top, there are two text fields: 'Name' with the value 'JONES, JULIE' and 'Number' with the value 'CP00009190'. Below these are two tabs: 'Address' (selected) and 'Assignment'. Under the 'Address' tab, there is a 'Style' dropdown menu showing 'United States (International)' and an 'Address' text field. Below this is a 'Details' section containing a 'Type' text field, a 'Dates' field with '04-DEC-2003', a 'Primary' checkbox which is checked, and a small icon button on the right.

9. Place your cursor in the **Address** field.

Result: The **Personal Address Information** window is displayed.



The screenshot shows the 'Personal Address Information' window. It contains several text fields: 'Address Style' (dropdown showing 'United States (International)' with a tooltip 'US International Address Style'), 'Address Line1', 'Address Line2', 'Address Line3', 'City', 'County', 'State', 'Zip Code', 'Country' (dropdown showing 'United States'), 'Telephone', and 'Telephone2'. At the bottom right, there are four buttons: 'OK', 'Cancel', 'Clear', and 'Help'.

10. Enter the patient's address and telephone information as described below.

Field Name	Description
Address Style	Defaults to United States (International)
Address Line1	Enter the street address of the person
Address Line2	Enter additional street address information
Address Line3	Enter additional street address information
City	Enter the city information
County	Enter the county information
State	Select the state information from the LOV
Zip Code	Enter the zip code
Country	Select a country from the LOV
Telephone	Enter a telephone number for the person
Telephone2	Enter an alternative telephone number for the person

Example: Below is a sample completed **Personal Address Information** form.

The screenshot shows a window titled "Personal Address Information" with a close button (X) in the top right corner. The form contains the following fields and values:

- Address Style: **United States (International)** (with a dropdown arrow on the right showing "US International Address Style")
- Address Line1: **1526 MAIN STREET**
- Address Line2: (empty)
- Address Line3: (empty)
- City: **WASHINGTON**
- County: (empty)
- State: **DC** (with a dropdown arrow on the right showing "District of Columbia")
- Zip Code: **20036**
- Country: **United States**
- Telephone: (empty)
- Telephone2: (empty)

At the bottom right of the window are four buttons: **OK**, **Cancel**, **Clear**, and **Help**.

11. Select the **OK** button.

Result: You are returned to the **Person Information** window.

Person Information

Name JONES, JULIE Number CP00009190

Address Assignment

Style United States (International)
Address United States (International).1526 MAIN STREET...WASHINGTON..DC.200:

Details

Type [] []
Dates 04-DEC-2003 [] []

[] []

12. Select the **Assignment** region tab.

Result: The assignment-related fields are displayed.

Person Information

Name: JONES, JULIE Number: CP00009190

Address Assignment

Assignment Number: CP00009190 Job: PAT

Position: Supervisor:

Organization: HNJ CC CLNCL CTR Billing Title:

Accounting Information

Set Of Books: NATIONAL INSTITUTES OF H

Default Expense Account:

Location Address

Location: Style:

Address: []

[]

13. Confirm the following values:

- the **Job** field displays "PAT"
- the **Organization** field displays "HNJ CC CLNCL CTR"

14. Save your work.

15. Close the **Person Information** window.

Result: The **Enter Person** window is displayed.

Enter Person

Name

Last Name

First

Middle

Title

JONES

JULIE

Identifier

Employee Number

Social Security

CP00009190

222-88-4456

Gender

Male

Female

Unknown

Employment Dates

04-DEC-2003

Personal Information

Birth Date

Mail

Home

Email


Work Telephone

Mgre ...

Note: The **Last Name**, **First**, **Middle**, and **Social Security** fields are gray, indicating that updates to these fields are prohibited. If changes are required, submit a request to the NBRSS - Govt Acctg mailbox.


End of activity.

Practice Lab

**nbrss**
NATIONAL INSTITUTES OF HEALTH
BUSINESS & RESEARCH SUPPORT SYSTEM

Practice Lab

Lab Time



Page 10

Complete Lab 1: Entering New Patient Travelers

Updating Patient Records




Updating Patient Records

After this lesson you should know how to:

- Enter New Bethesda Clinical Center Patient Travelers
- ➔ **Update Bethesda Clinical Center Patient Records**
- Manually Execute Scheduled Processes

Updating Clinical Center Records

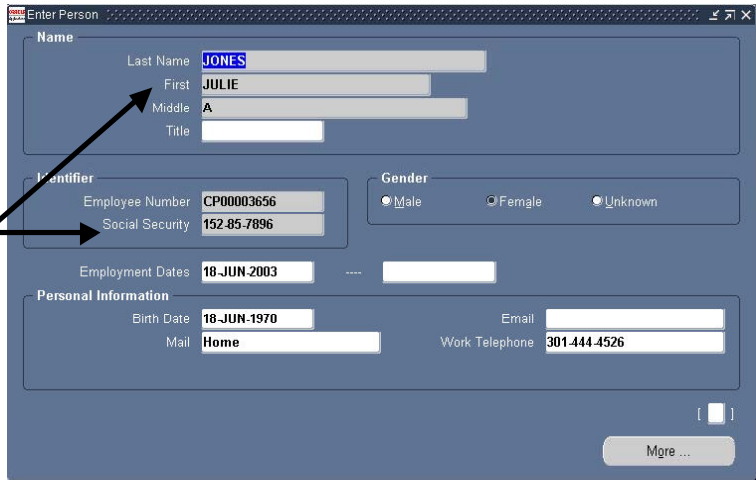


Updating Clinical Center Records

The Clinical Center can not update the following fields after saving the record:

- Patient's Name
- Patients SSN

Restricted from Updating



If an update is required to the **Name or Social Security** fields, the Clinical Center must submit a request to the NBRSS – Govt Acctg mailbox.

Page 12

The Clinical Center patient records may require updating in the event that:

- OFM requests an update be made based upon their review of the Patient Audit Report
- The Clinical Center locates an error on a previously entered patient
- A patient submits a change in name, SSN, or address.

OFM Identifies Error on the Patient Audit Report



OFM Identifies Error on the Patient Audit Report

Scenario:

OFM identifies an error on the Patient Audit Report

Course of Action:

Error in Address:

- OFM contacts Clinical Center staff who entered the record and request that they update the record as required.
- Clinical Center makes the changes to the address

Error in Patient's Name or SSN:

- OFM contacts the Clinical Center for support documentation.
- OFM corrects the error in the Employee table.

Clinical Center Identifies Error



Clinical Center Identifies Error

Scenario:

The Clinical Center identifies an error on the patient record

Course of Action:

Error in Address:

Clinical Center staff make the correction to the address

Error in Patient's Name or SSN:

- Clinical Center staff submits a request via email to the NBRSS – Govt Acctg mailbox
- OFM will ensure proper support for the change before making the update to the record

Patient Information Changes



Patient Information Changes

Scenario:

The patient informs the Clinical Center of changes to personal information

Course of Action:

Changes to Address Information

Clinical Center staff make the correction to the address

Changes to Patient's Name or Social Security Number

- Clinical Center staff submits a request via email to the NBRSS – Govt Acctg mailbox
- OFM will ensure proper support for the change before making the update to the record

Modifying Clinical Center Patient Information

Purpose

The purpose of this document is to describe how to modify Bethesda Clinical Center patients in the NBS.

NIH Clinical Center Patient Entry User

N > Enter Person

Enter Person

Enter Person

Name

Last Name

First

Middle

Title

Identifier

Employee Number

Social Security

Gender

☒ Male ☐ Female ☐ Unknown

Employment Dates ----

Personal Information

Birth Date


Mail

Email

Work Telephone

[]

More ...

1. Select the **Find**  button from the applications toolbar.

Result: The **Find Employees** window is displayed.

The screenshot shows a window titled "Find Employees" with a dark blue header. Below the header, there are five input fields arranged vertically. The first field is labeled "Full Name" and has a small dropdown arrow on its right side. The other four fields are labeled "Number", "Social Security", "Location", and "Supervisor". At the bottom of the window, there are three buttons: "Clear", "New", and "Find".

2. Enter the search criteria as described below:

Field	Description
Full Name	Select the person's full name from the LOV
Number	Enter the employee number or select it from the LOV
Social Security	Enter the person's social security number or select it from the LOV
Location	Enter the person's location or select it from the LOV
Supervisor	The NIH currently does not use this field

3. Select the **Find** button.

Result: The Patient record is displayed in the **Enter Person** window.

Enter Person

Name

Last Name

First

Middle

Title

Identifier

Employee Number

Social Security

Gender

☒ Male ☐ Female ☐ Unknown

Employment Dates ----

Personal Information

Birth Date

Email

Mail

Work Telephone

[☐]

4. Modify the **Personal Information** block as required.
5. Save your work.

If a modification to the patient's address or telephone numbers is required, goto task #6. Otherwise, end of activity.

6. Select the **More** button.

Result: The **Person Information** window is displayed.

Person Information

Name: JONES, JULIE A Number: CP00003656

Address Assignment

Style: United States (International)

Address: United States (International).1777 S Street, NW.Apt. 34..Washington..DC

Details

Type: ☒ Primary

Dates: 18-JUN-2003 ---- []

7. Place your cursor in the **Address** field.

Result: The **Personal Address Information** window is displayed.

Personal Address Information

Address Style: United States (International) US International Address Style

Address Line1: 1777 S STREET NW

Address Line2: APT 34

Address Line3:

City: WASHINGTON

County:

State: DC District of Columbia

Zip Code: 20016

Country: United States

Telephone: 202-555-9696

Telephone2:

OK Cancel Clear Help

8. Modify the patient's address and telephone information as required.

Field	Description
Address Style	Defaults to United States (International)
Address Line1	Enter the street address of the person
Address Line2	Enter additional street address information
Address Line3	Enter additional street address information
City	Enter the city information
County	Enter the county information
State	Select the state information from the LOV
Zip Code	Enter the zip code
Country	Select a country from the LOV
Telephone	Enter a telephone number for the person
Telephone2	Enter an alternative telephone number for the person

9. Select the **OK** button.

Result: You are returned to the **Person Information** window.

The screenshot shows a window titled "Person Information". At the top, there are two input fields: "Name" with the value "JONES, JULIE A" and "Number" with the value "CP00003656". Below these are two tabs: "Address" (selected) and "Assignment". Under the "Address" tab, there are two fields: "Style" with the value "United States (International)" and "Address" with the value "United States (International).1777 S STREET NW.APT 34..WASHINGTON..". Below these is a "Details" section containing a "Type" dropdown menu, a "Dates" field with the value "18-JUN-2003", a "Primary" checkbox which is checked, and a small icon button on the right.

10. Save your work.
11. Close the **Person Information** window.

Result: The **Enter Person** window is displayed.

Enter Person

Name

Last Name

First

Middle

Title

JONES

JULIE

A

Identifier

Employee Number

Social Security

CP00003656

152-85-7896

Gender

Male

Female

Unknown

Employment Dates

18-JUN-2003

Personal Information

Birth Date

Mail

Home

18-JUN-1970

Email

Work Telephone


301-444-4526

More ...


Note: The **Last Name**, **First**, **Middle**, and **Social Security** fields are gray, indicating that updates to these fields are prohibited. If changes are required, submit a request via email to the NBRSS - Govt Acctg mailbox.

End of activity.

Practice Lab

**Practice Lab**



Lab Time



Page 16

Complete Lab 2: Modifying Clinical Center Patient Records

Patient Audit Report



Patient Audit Report

➤ The Patient Audit Report has been developed to facilitate the review of Clinical Center patient entry

Full Name	Employee #	SSN	Person Type	Address	Creation/Update Date
Zumbrun, Allen	CP00003654	111-22-2333	CLINICAL_CENTER_PATIENT	321 TAYLOR AVE ROCKVILLE MD 20850 US	13-JUN-03 / 13-JUN-03
WAYNE, JOHN	CP00003655	789-12-4567	CLINICAL_CENTER_PATIENT	10230 DUE RANCH HUSTON TX US	13-JUN-03 / 13-JUN-03
HARMAN, RACHEL	CP00003664	859-25-4658	CLINICAL_CENTER_PATIENT	998 GREEN ROAD SALT LAKE CITY UT 859632 US	27-JUN-03 / 27-JUN-03
MAXINE, DURON	CP00003672		CLINICAL_CENTER_PATIENT	85 SUX AK US	27-JUN-03 / 27-JUN-03
JONES, JULIE A	CP00003656	152-85-7896	CLINICAL_CENTER_PATIENT	1777 S Street, NW Apt. 34 Washington DC 20016 US	18-JUN-03 / 18-JUN-03

➤ Run the report as necessary to ensure accurate entry of information

➤ The report may be run for a specific date range such that records entered or updated within that date range will be displayed

Page 17

The Patient Audit Report displays Clinical Center patient records that have been entered or updated within the date range specified in the report parameters.

The following information is displayed on the report:

- Patient's Full Name
- Employee Number
- Social Security Number
- Person Type (Always Clinical Center Patient)
- Address
- Created Date/Updated Date

Items for review include:

- Completeness of information
- Duplicative records
- Accuracy of information

Submitting the Patient Audit Report

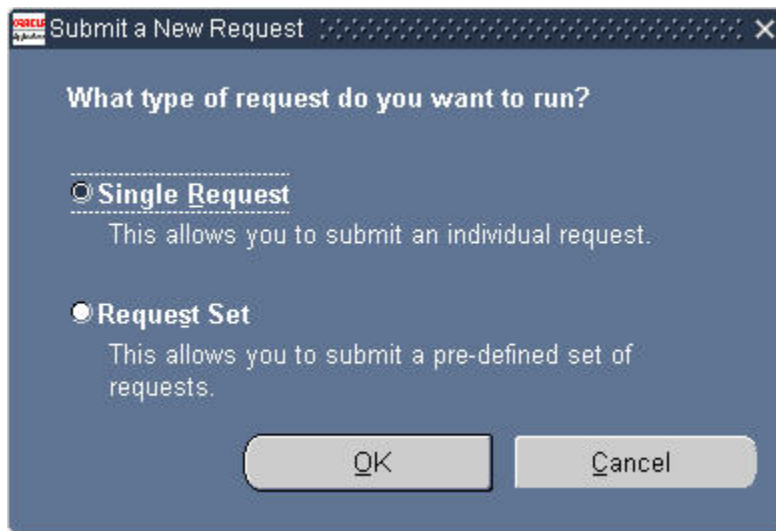
Purpose

The purpose of this document is to describe how to generate the Patient Audit Report. The Patient Audit Report is used to review the patient traveler records entered into the NBS by the Clinical Center

NIH Payables Manual Vendor Entry User/ NIH Clinical Center Patient Entry

N > Other > Requests > Run

Submit a New Request



1. Select the **OK** button.

Result: The **Submit Requests** window is displayed.

Submit Request

Run this Request...

Name

Parameters

Language **Languages...**

At these Times...

Run the Job **As Soon as Possible** **Schedule...**

Upon Completion...

☒ Save all Output Files

Notify **Options...**

Print to

Help (H) **Submit** **Cancel**

- Click on the **LOV** in the **Name** field and select **NIHTM Patient Audit Report**

Result: The **Parameters** window is displayed.

Submit Request

Run this Request...

Name **NIHTM Patient Audit Report** **Copy...**

Parameters

Language **American English** **Languages...**

At these Times...

Run the Job **As Soon as Possible** **Schedule...**

Upon Completion...

☒ Save all Output Files

Notify **Options...**

Print to

Help (H) **Submit** **Cancel**

Parameters

Person Type **CLINICAL_CENTER_PATIENT** Clinical Center Pa

Start Date

End Date

OK **Cancel** **Clear** **Help**

- In the **Start Date** field, enter the date from which you want to review the records.
- In the **End Date** field, enter the date to which you want to review the records.
- Select the **OK** button.

Result: The **Parameters** window closes.

6. Select the **Submit** button.

Result: The **Requests** window is displayed.

The screenshot shows a software window titled "Requests". At the top, there are three buttons: "Refresh Data", "Find Requests", and "Submit a New Request...". Below these buttons is a table with the following columns: "Request ID", "Name", "Parent", "Phase", "Status", and "Parameters". The first row of the table is highlighted in blue and contains the following data: "116565", "NIHTM Patient Audit Rep", an empty "Parent" cell, "Pending" (in a green box), "Normal" (in a green box), and "CLINICAL_CENTER_PATIENT, 01-J". Below the table, there are six buttons arranged in two rows: "Hold Request", "View Details...", "View Output" in the first row, and "Cancel Request", "Diagnostics", "View Log..." in the second row.

Request ID	Name	Parent	Phase	Status	Parameters
116565	NIHTM Patient Audit Rep		Pending	Normal	CLINICAL_CENTER_PATIENT, 01-J


7. Select the **Refresh Data** button until the **Phase** field displays "Completed"

Note: If the **Status** field displays anything other than "Normal", contact the NIH Help Desk.


8. Select the **View Output** button to view the report.

End of activity.

Practice Lab

**Practice Lab**

Lab Time



Page 18

Complete Lab 3: Submitting Requests # 1 – 2 only.

Manually Executing Scheduled Processes



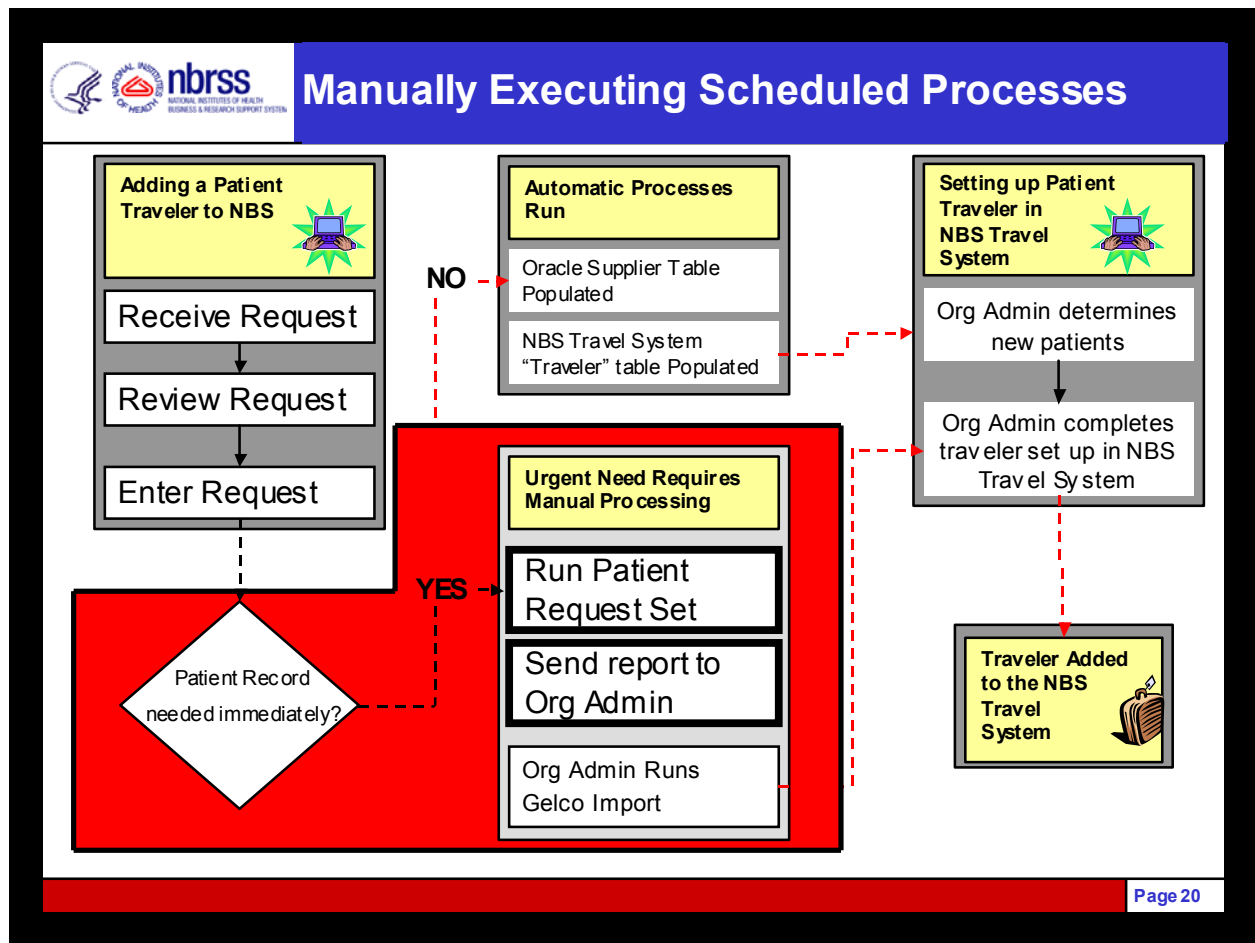
Manually Executing Scheduled Processes

After this lesson you should know how to:

- Enter New Bethesda Clinical Center Patient Travelers
- Update Bethesda Clinical Center Patient Records

→ Manually Execute Scheduled Processes

Option 3: Oracle Extension



If a patient record is required in the NBS Travel System immediately, then the Clinical Center Patient Entry Staff and the Organization Administrator can perform the tasks in Oracle and GTM 8.1 Administration Module manually.

The Clinical Center Patient Entry Staff will run a request set to populate the Oracle Supplier and Gelco Traveler interface tables. In addition, the request set will generate the report that the Organization Administrator will use to set up the patients in the NBS Travel System.

Upon receipt of the report, the Org Admin will run the process to populate the Gelco traveler tables and then perform the standard set up functions as with any new traveler.

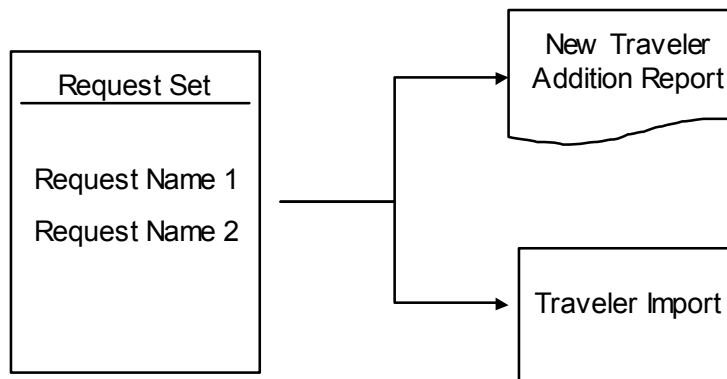
Running the Patient Addition Request Set



Running the Patient Addition Request Set

The Patient Addition Request Set contains two items:

- The program that populates the Oracle Supplier and Gelco Traveler Interface tables
- The New Traveler Addition Report



Submitting the Patient Addition Request Set

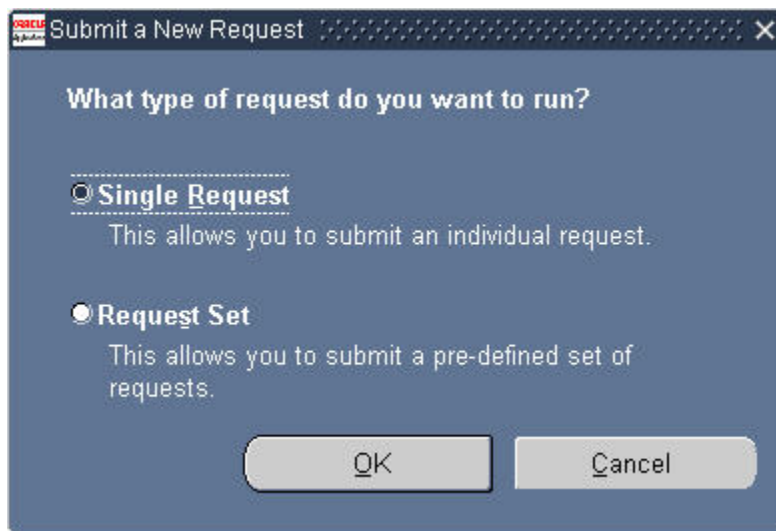
Purpose

The purpose of the Patient Addition Request Set is to expedite the process of transferring patient traveler records entered in the Oracle HR table into the Supplier table and Gelco Traveler Interface tables. The request set also contains the New Traveler Addition Report that can be used by the Organization Administrator to identify new patients that were added.

NIH Clinical Center Patient Entry User

N > Other > Requests > Run

Submit a New Request



1. Select the **Request Set** radial button and select **OK**.

Result: The **Submit Request Set** window is displayed

Submit Request Set

Run this Request...

Request Set

Copy...

Program	Stage	Parameters	Language

Options...

At these Times...

As Soon As Possible

Schedule...

Help (A) Submit Cancel

2. In the **Request Set** field, select the **LOV** button.

Result: The Patient Addition Request Set is populated in the name field and the two requests are displayed in the **Program** fields.

Submit Request Set

Run this Request...

Request Set **NIH Patient Addition**

Copy...

Program	Stage	Parameters	Language
NIHTM Convert Employee into V...	NIHTM Convert Employee		American English
NIHTM New Traveler Addition Re...	NIHTM New Traveler Ac		American English

Options...

At these Times...

As Soon As Possible

Schedule...

Help (A) Submit Cancel

- Place your cursor in the **Parameters** field of the line for the **NIHTM New Traveler Addition Report**.

Result: The **Parameters** window is displayed.

Parameters

Organization Id

Start Date

End Date

OK Cancel Clear Help

- In the **Organization ID** field, select "HNK0000000C" from the **LOV**.
- Tab to the **Start Date** field and enter the date from which you would like to review the entries.

Note: The date format DD-MMM-YYYY must be followed.

- Tab to the **End Date** field and enter the date to which you would like to review the entries.

Note: The date format DD-MMM-YYYY must be followed.

Example: Below is an example completed parameters window.

Parameters

Organization Id: **HN** HN NIH NATIONAL

Start Date: **01-JUN-2003**

End Date: **15-JUN-2003**

OK Cancel Clear Help

7. Select the **OK** button.

Result: The **Parameters** window closes and you are returned to the **Submit Request Set** window.

8. Select the **Submit** button.

Result: The **Requests** window is displayed.

Requests

Refresh Data Find Requests Submit a New Request...

Request ID	Name	Parent	Phase	Status	Parameters
154016	NIH Patient Addition (Rep		Pending	Scheduled	12499, 709
147527	Reprint output of request		Completed	Normal	147266, nbsr3can552, 1, LANDWIDI
147417	Reprint output of request		Completed	Normal	147415, nbsr3can550, 1, LANDWIDI
147416	Reprint output of request		Completed	Normal	147415, nbsr3can552, 1, LANDWIDI
147415	NIHTM Patient Audit Rep		Completed	Normal	CLINICAL_CENTER_PATIENT, 14-A
147414	Reprint output of request		Completed	Normal	147266, nbsr3can550, 1, LANDWIDI
147268	Reprint output of request		Completed	Normal	147266, nbsr3hp41k2, 1, LANDWIDI
147267	Reprint output of request		Completed	Normal	147266, nbsr3can552, 1, LANDWIDI
147266	NIHTM Patient Audit Rep		Completed	Normal	CLINICAL_CENTER_PATIENT, 01-JI
140045	Suppliers Report		Completed	Normal	35824, , Vendor Name, 1, , , , , ,


Hold Request View Details... View Output

Cancel Request Diagnostics View Log...

9. Select the **Refresh Data** button until the NIHTM New Traveler Addition Report has completed successfully.
10. Select the **View Output** to view the results of the report.


End of activity.

Practice Lab

**nbrss**
NATIONAL INSTITUTES OF HEALTH
BUSINESS & RESEARCH SUPPORT SYSTEM

Practice Lab

Lab Time



Page 22

Complete Lab 3: Submitting Requests # 3 – 4 only.

Lesson Summary



Lesson Summary

In this lesson you learned how to:

- Enter New Bethesda Clinical Center Patient Travelers
- Update Bethesda Clinical Center Patient Records
- Manually Execute Scheduled Processes

Important Dates and Information

Chapter 6

Important Dates and Information

The slide features a header with the Nabrss logo (National Institutes of Health Business & Research Support System) and the text 'Important Dates and Information' in a large blue box. Below this, a red box contains the text 'Track 2 End User Training'.



NBS Track 2 Go-Live

September 1, 2003

NBS Travel System and supporting financial modules were deployed for entering FY04 travel documents

October 1, 2003 or when FY04 funding is available

Financial transactions resulting from FY04 travel documents will be processed

Page 1

Initial Oracle Set Up Required




Initial Oracle Set Up Required

The first time you log into the NBS, you will be required to:

- Download Oracle J-Initiator and
- Update your internet browser security settings

Refer to the technical guidance provided on the NBS
Technical website: <http://nbs.nih.gov/technical.html>

NBS Travel Support Resources


**nbrss**
NATIONAL INSTITUTES OF HEALTH
BUSINESS & RESEARCH SUPPORT SYSTEM

NBS Travel Support Resources

- **NBS Travel Web links available 24/7**
 - NBS Oracle Online Help and Reference: <http://nbs.nih.gov/training.html>
- **NIH Portal Support**
 - Phone NIH Help Desk at 6-HELP (301.496.4357)
 - Portal website address: <http://my.nih.gov>
- **NBS Customer Support**
 - Phone: Call 5-NBS7 (301.435.6277)
 - E-mail: Send e-mail to tasc@NIH.gov
 - Web Request for Support: Submit to: <http://support.dit.nih.gov>
- **nVision**
 - nVision is an evolution of the NIH Data Warehouse, and it is the new reporting system designed to work in concert with the NBS. nVision is a business intelligence system that delivers NIH-defined standard reports and facilitates the development of user-created ad hoc reports to support decision-making and analysis. The first NBS module to be supported by nVision is Travel.
 - E-mail: Send e-mail to nVisionSupport@nih.gov
 - Web Site for information: <http://nvision.nih.gov>

Page 3

Evaluation

**Evaluation**


**Please take a moment to complete the
on-line training evaluation**

www.surveymonkey.com/s.asp?u=44111257699

Your comments are important to us!

Page 4

Good Luck

	Good Luck	
<h1>Good Luck!</h1>		
		Page 5

